Full AI review prompt for engagement letters

https://seamlss.com.au/help/engagement-letter-ai-review-prompt/

Current as at 12 November 2026. Checked against the Seamlss template editor and its tokens on that date.

This prompt converts your engagement letter into a Seamlss template and also gives you a review report: what changed, what might be missing or out of date, and questions to confirm before you use it.

The report is a checklist to help your review, not legal advice. The AI can be wrong about current rules, so check anything it flags against the TPB website and your professional body, and have the final letter reviewed by a lawyer.

Before you upload anything: use a blank template, not a letter signed by a client. Remove any client names, TFNs or personal details, and check your firm's AI policy. The TPB's guidance on AI use (**TPB(GS) 55/2026**) applies to how you use these tools.

What this prompt includes

Part	What the AI does
1. Convert the letter	Keeps your wording, swaps client and firm details for Seamlss tokens, removes signature blocks and entity lists, and gives you the template as HTML to paste.

Part	What the AI does
2. Review report	Lists what it changed, the tokens and placeholders it used, possible gaps or outdated items to confirm, and questions to answer before you use the letter.
3. Check its work	Confirms only Seamlss tokens are used and nothing was added to your letter.
Tokens	{{AGENT_NUMBER}}, {{CLIENT_NAME}}, {{CONTACT_FULL_NAME}}, {{CONTACT_NAME}}, {{DATESTAMP}}, {{ORGANISATION_NAME}}

Use the prompt

1

Copy the prompt

Click **Copy prompt** on the full review prompt.

2

Run it in your AI tool

Paste it into ChatGPT, Claude or Copilot, then attach or paste your letter.

3

Paste the template into Seamlss

When the AI gives you the result, use the copy button on the code block (don't highlight the text by hand). In **Template content**, click the **Source code** button (`<>`) at the end of the toolbar, paste the result in and click **Save**, then **Save Template**. Preview it with a test client before you use it.

4

Work through the report

Confirm each flagged item and answer the questions before you send the letter to a client.

Full review prompt

See the quick prompt

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You're helping an Australian accounting or tax practice convert its engagement
letter into a template for Seamlss, a client onboarding platform. The letter
is attached or pasted below.

Work through three parts in order.

PART 1: CONVERT THE LETTER

Rules:
1. Keep the firm's wording. Don't add, remove or rewrite clauses except where
these rules say to. Suggested changes go in the Part 2 report, not the
template.
2. Replace client and firm details with these Seamlss tokens, exactly as
written:
   - {{CLIENT_NAME}} for the client being engaged (for example after
"Client:")
   - {{CONTACT_NAME}} for the recipient's first name in the greeting, for
example "Dear {{CONTACT_NAME}}"
   - {{CONTACT_FULL_NAME}} only where the recipient's full name is needed
(this is the person receiving the letter, which may differ from the client
entity)
   - {{DATESTAMP}} for the date of the letter
   - {{ORGANISATION_NAME}} for the firm's name
   - {{AGENT_NUMBER}} for the firm's tax agent number
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If the letter needs more than one person or entity to sign (for example several directors, trustees or a family group), flag it in the report and suggest wording where the person accepting confirms they're authorised to accept for everyone covered. Don't add that wording to the template yourself.
7. Seamlss adds the accept button automatically. Don't add any button, link or instruction to click.
8. Remove any list of entities from the body. Seamlss lists the entities at the bottom of the letter.
9. Move letterhead or footer details (entity name, ABN, address, contact details, Professional Standards liability line) to the end of the letter body.
10. Use Australian English and plain hyphens rather than em dashes.

Give me the finished template as HTML in a single code block so I can copy it exactly.

PART 2: REVIEW REPORT

After the code block, write a report with these headings.

Changes made
A short list of everything you changed, removed or moved, and why.

Tokens and placeholders
Each token used and where, then every [square bracket placeholder] the firm

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disclosure (check against TPB(GS) 55/2026)
- Identity verification and client due diligence, if the firm has AML/CTF
obligations for the services it provides
- Limitation of liability and any Professional Standards scheme
- Ownership of documents, record keeping and what happens to records when the
engagement ends
- Wording that suits online acceptance rather than a wet signature
- Anything that looks dated: old financial years, references to superseded
guidance or legislation, COVID-era clauses, old software, staff who may have
left, wrong firm name or ABN

Don't state law or regulatory requirements as certain. If you're not sure
something is current, say so and suggest the firm checks the TPB website or
its professional body.

Questions to confirm
A short numbered list of questions the firm should answer before using the
template.

PART 3: CHECK YOUR WORK

Before you finish, check that:
- Only the tokens listed above appear in the template
- The template is HTML using only the tags in rule 4, with no markdown, styles
or classes
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Only need the conversion? The quick conversion prompt converts your letter with a short list of notes, no report.

Use the quick prompt

Back to **Creating Engagement Letter Templates**.