ANNUAL TAX SERVICE RETAINER AGREEMENT

This Agreement is entered into and made effective as of _____, 20____, by and between the following parties:

Service Provider: _____

Client: _____

1. SCOPE OF SERVICES

The Service Provider agrees to perform annual tax preparation and related consulting services for the Client. The specific services included under this annual retainer are:

1. Preparation and electronic filing of federal, state, and local income tax returns for the tax year _____.
2. Year-round tax planning consultation, up to a maximum of _____ hours per calendar year.
3. Review of tax-related correspondence from municipal, state, and federal tax authorities received during the term of this Agreement.

2. RETAINER FEE & PAYMENT TERMS

In consideration for the services outlined in Section 1, the Client agrees to pay an annual retainer fee in the amount of $_____.

The retainer fee shall be payable in the following manner:

1. A non-refundable deposit of $_____ due upon the signing of this Agreement.
2. The remaining balance to be paid as follows: _____.

Any services requested by the Client exceeding the scope of this Agreement will be billed at an additional hourly rate of $_____ per hour.

3. CLIENT RESPONSIBILITIES

The Client agrees to provide all necessary financial records, receipts, statements, and receipts required for the preparation of the tax returns in a timely manner. The Service Provider is not responsible for tax returns that are filed late or incur penalties due to the Client's failure to provide required documentation by _____.

4. TERM AND TERMINATION

This Agreement shall commence on the date first written above and shall remain in effect for a period of one (1) year. Either party may terminate this Agreement by providing _____ days written notice to the other party.

5. GOVERNING LAW

This Agreement shall be governed by and construed in accordance with the laws of the State of _____.

IN WITNESS WHEREOF, the parties hereto have executed this Annual Tax Service Retainer Agreement as of the date first written above.

SERVICE PROVIDER:

SIGNATURE

PRINT NAME

DATE

CLIENT:

SIGNATURE

PRINT NAME

DATE