

MONTHLY RETAINER AGREEMENT

CPA ADVISORY SERVICES

This Monthly Retainer Agreement (the "Agreement") is entered into and made effective as of _____, by and between:

CPA Firm: _____

Address: _____

And

Client: _____

Address: _____

1. ENGAGEMENT & SCOPE OF SERVICES

The Client hereby retains the CPA Firm, and the CPA Firm agrees to provide professional CPA and financial advisory services to the Client. The scope of services covered under this monthly retainer includes:

1. _____
2. _____
3. _____
4. _____

Any services requested by the Client outside of this explicitly stated scope will be subject to a separate agreement or billed at the CPA Firm's standard hourly rate of _____ per hour.

2. TERM AND TERMINATION

This Agreement shall commence on _____ and shall continue on a month-to-month basis. Either party may terminate this Agreement at any time, with or without cause, by providing _____ days written notice to the other party.

3. RETAINER FEES AND BILLING

In consideration for the services outlined in Section 1, the Client agrees to pay the CPA Firm a recurring monthly retainer fee of _____.

The monthly retainer fee is due and payable in advance on the _____ day of each calendar month. Payments shall be made via _____. Late payments will incur a fee of _____ or interest at a rate of _____% per month, whichever is higher.

4. CLIENT RESPONSIBILITIES

The Client agrees to provide the CPA Firm with all necessary, accurate, and complete financial records, information, and access to personnel required to perform the services. The CPA Firm is not responsible for any errors, omissions, or penalties resulting from inaccurate or untimely information provided by the Client.

5. CONFIDENTIALITY AND PROFESSIONAL STANDARDS

The CPA Firm and the Client agree to keep all financial information, trade secrets, and proprietary business information strictly confidential. The CPA Firm will perform all services in accordance with applicable professional and ethical standards.

6. LIMITATION OF LIABILITY

The CPA Firm's maximum liability for any claims, losses, or damages arising out of this Agreement shall be strictly limited to the total fees paid by the Client to the CPA Firm under this Agreement during the _____ months immediately preceding the event giving rise to the liability.

7. GOVERNING LAW

This Agreement shall be governed by and construed in accordance with the laws of the State of _____, without regard to its conflict of law principles.

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

CPA FIRM:

CLIENT:

Authorized Representative Signature

Authorized Representative Signature

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____