

RECURRING ANNUAL TAX FILING AND COMPLIANCE CONTRACT

This Agreement for Annual Tax Compliance Services (the "Agreement") is entered into and made effective as of _____, by and between:

Service Provider: _____, with a principal place of business at _____ (hereinafter referred to as the "Accountant"),

and

Client: _____, with a principal address at _____ (hereinafter referred to as the "Client").

1. Scope of Services

The Accountant agrees to provide the following recurring annual tax and compliance services to the Client:

1. Preparation and filing of annual federal, state, and local income tax returns.
2. Review of financial statements, balance sheets, and supporting documentation necessary for tax preparation.
3. Ongoing annual tax planning consultations, limited to _____ hours per fiscal year.
4. Monitoring and advising on relevant changes in tax legislation affecting the Client's financial standing.

2. Term and Renewal

This Agreement shall commence on the date first written above and shall remain in effect for an initial term of one (1) year. Thereafter, this Agreement shall automatically renew for successive one-year terms unless either party provides written notice of non-renewal at least _____ days prior to the end of the current term.

3. Compensation and Payment

For the services outlined in Section 1, the Client agrees to pay the Accountant a recurring annual fee of _____.

Payment shall be due as follows:

- A retainer of _____ due on _____ of each fiscal year.
- The remaining balance of _____ due upon delivery of the completed draft tax return for review, and prior to final submission.

Any additional services outside the scope of this Agreement will be billed at an hourly rate of _____.

4. Client Responsibilities and Information Delivery

The Client agrees to provide all necessary financial records, receipts, forms, and information required for the accurate preparation of tax returns. All requested documentation must be delivered to the Accountant no later than _____ of each tax year. The Accountant shall not be held liable for tax penalties, late fees, or interest resulting from the Client's failure to provide accurate and timely information.

5. Confidentiality

Both parties agree to maintain the strict confidentiality of all financial, personal, and business information disclosed during the term of this Agreement. The Accountant shall implement appropriate security measures to safeguard all Client data in compliance with applicable professional standards and laws.

6. Limitation of Liability

The Accountant's liability for any errors, omissions, or negligence under this Agreement shall be limited to the total amount of fees paid by the Client to the Accountant under this Agreement during the applicable fiscal year in which the event occurred.

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.

8. Entire Agreement

This Agreement constitutes the entire understanding between the parties regarding the subject matter hereof and supersedes all prior agreements, representations, or understandings, whether written or oral.

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

CLIENT:

ACCOUNTANT:

Signature

Signature

Print Name

Print Name

Title

Title

Date

Date

