

RETAINER AGREEMENT FOR STRATEGIC BUSINESS ACCOUNTING SERVICES

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

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

and

Client: _____ with a principal place of business at _____ (hereinafter referred to as the "Client").

1. ENGAGEMENT AND SCOPE OF SERVICES

The Client hereby retains the Accountant, and the Accountant agrees to provide strategic business accounting and advisory services to the Client. The scope of services shall include, but is not limited to, the following:

1. Strategic financial analysis and planning.
2. Regular review and reconciliation of financial statements.
3. Tax planning, compliance, and strategy consultations.
4. Budgeting, forecasting, and cash flow management advisory.
5. Other mutually agreed upon accounting services as outlined in written addenda to this Agreement.

2. RETAINER FEE AND PAYMENT TERMS

In consideration for the services to be performed, the Client agrees to pay the Accountant a recurring retainer fee under the following terms:

1. **Retainer Amount:** The Client shall pay a recurring retainer fee of \$ _____ per _____.
2. **Payment Schedule:** The retainer fee is due in advance on the _____ day of each period. The first payment is due on or before _____.
3. **Additional Services:** Any services requested by the Client that fall outside the scope of this Agreement will be billed at an hourly rate of \$ _____ per hour, or as otherwise agreed in writing before services are rendered.

3. TERM AND TERMINATION

This Agreement shall commence on _____ and shall remain in effect:

1. Until _____, unless terminated earlier in accordance with this Section.
2. Either party may terminate this Agreement at any time, with or without cause, by providing _____ days written notice to the other party.
3. Upon termination, the Accountant shall cease all work, and the Client shall pay for all services rendered up to the effective date of termination.

4. CONFIDENTIALITY AND DATA SECURITY

The Accountant acknowledges that during the term of this Agreement, they will have access to confidential financial information of the Client. The Accountant agrees to maintain strict confidentiality regarding all such information and to employ industry-standard security measures to prevent unauthorized disclosure, except as required by law.

5. GOVERNING LAW AND JURISDICTION

This Agreement shall be governed by, construed, and enforced in accordance with the laws of the State of _____, without regard to its conflict of law principles. Any legal actions arising under this Agreement must be brought in the courts of _____.

6. 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 Retainer Agreement as of the date first written above.

CLIENT:

ACCOUNTANT:

Signature

Printed

Name:

Title:

Date:

Signature

Printed

Name:

Title:

Date: