

STANDARD ANNUAL TAX RETURN AND COMPLIANCE AGREEMENT

This Agreement is entered into on this _____ day of _____, 20_____, by and between:

Service Provider:

Address: _____

Contact: _____

Client:

Address: _____

Tax Identification Number / SSN: _____

1. SCOPE OF SERVICES

The Service Provider shall perform the following annual tax compliance services for the Client for the tax year ending _____:

1. Preparation of the annual federal, state, and local income tax returns.
2. Review of financial statements, records, and support documentation provided by the Client.
3. Electronic filing (or manual preparation if required) of the completed tax returns upon receipt of signed authorization forms from the Client.
4. Basic tax advisory services directly related to the preparation of the aforementioned returns.

2. CLIENT RESPONSIBILITIES

1. The Client is responsible for providing all necessary, accurate, and complete financial records, forms, statements, and receipts in a timely manner, but no later than _____.
2. The Service Provider will not audit or otherwise verify the information submitted, and the Client remains fully liable for the accuracy of the tax returns.
3. The Client is responsible for paying all taxes, penalties, and interest assessed by tax authorities.

3. FEES AND PAYMENT TERMS

For the services outlined in this Agreement, the Client agrees to pay the Service Provider as follows:

Base Fee: \$_____

Payment Schedule: _____

Any additional work requested outside the scope of this Agreement will be billed at an hourly rate of \$_____ per hour.

4. TERM AND TERMINATION

This Agreement shall commence on the date of execution and shall remain in effect until the completion of the tax services for the specified tax year, unless terminated earlier by either party upon _____ days written notice.

5. CONFIDENTIALITY AND DATA PROTECTION

Both parties agree to keep all financial and personal information strictly confidential. The Service Provider shall implement appropriate security measures to safeguard the Client's sensitive data in compliance with applicable laws.

6. LIMITATION OF LIABILITY

The Service Provider's total liability for any claims, losses, damages, or expenses arising under this Agreement shall not exceed the total fees paid by the Client under this Agreement.

7. 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 Agreement as of the date first written above.

For the Service Provider:

Signature

Printed Name

Title / Date

For the Client:

Signature

Printed Name

Title / Date