

# STANDARD CONTRACT FOR TAX PLANNING AND CONSULTATION SERVICES

## Agreement for Tax Planning and Advisory Services

This Agreement for Tax Planning and Advisory Services (hereinafter referred to as the "Agreement") is entered into on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by and between:

**Service Provider:** \_\_\_\_\_, with a principal place of business at \_\_\_\_\_ (hereinafter referred to as the "Advisor"),

and

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

The Advisor and the Client may collectively be referred to as the "Parties" or individually as a "Party."

### 1. SCOPE OF SERVICES

The Advisor agrees to provide the Client with professional tax planning and advisory services as detailed below:

- a. Analysis of the Client's financial information, transaction structures, and potential tax implications.
- b. Development of tax-efficient planning strategies in accordance with applicable federal, state, and local tax laws and regulations.
- c. Consultation on specific tax queries raised by the Client.
- d. Other related advisory services as agreed upon in writing by both Parties:  
\_\_\_\_\_

### 2. FEES AND COMPENSATION

In consideration for the services rendered under this Agreement, the Client agrees to compensate the Advisor as follows:

- a. **Service Fee:** A flat fee of \$\_\_\_\_\_, or an hourly rate of \$\_\_\_\_\_ per hour.
- b. **Retainer:** A non-refundable retainer fee of \$\_\_\_\_\_ is required upon execution of this Agreement, to be applied against the final billings.
- c. **Billing and Payment:** Invoices will be issued \_\_\_\_\_. All invoices are due and payable within \_\_\_\_\_ days of the invoice date.

### 3. CLIENT RESPONSIBILITIES AND OBLIGATIONS

The Client agrees to provide the Advisor with all accurate, complete, and necessary financial records, documents, tax histories, and other relevant information in a timely manner. The Advisor shall not be responsible for any errors, omissions, or penalties resulting from inaccurate, incomplete, or delayed information provided by the Client.

### 4. CONFIDENTIALITY

The Advisor agrees to maintain strict confidentiality regarding all financial, business, and personal information provided by the Client under this Agreement. No confidential information shall be disclosed to any third party without the prior written consent of the Client, except as required by law or professional regulatory authorities.

### 5. TERM AND TERMINATION

This Agreement shall commence on the date first written above and shall continue until the services are completed, unless terminated earlier as provided herein. Either Party may terminate this Agreement at any time by providing \_\_\_\_\_ days written notice to the other Party. Upon termination, the Client shall pay the Advisor for all services rendered and expenses incurred up to the effective date of termination.

**6. LIMITATION OF LIABILITY**

The Advisor's advice is based on professional interpretation of existing tax codes, regulations, and administrative rulings. The Advisor does not guarantee any specific tax outcome or audit result. To the maximum extent permitted by law, the Advisor's aggregate liability under this Agreement shall not exceed the total fees paid by the Client to the Advisor under this Agreement.

**7. GOVERNING LAW AND DISPUTE RESOLUTION**

This Agreement shall be governed by, construed, and enforced in accordance with the laws of the State of\_\_\_\_\_. Any disputes arising from this Agreement shall first be submitted to mediation, and if unresolved, shall be settled through binding arbitration in \_\_\_\_\_.

**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. Any amendments to this Agreement must be in writing and signed by both Parties.

IN WITNESS WHEREOF, the Parties hereto have executed this Agreement for Tax Planning and Advisory Services as of the date first written above.

**FOR THE ADVISOR:**

**FOR THE CLIENT:**

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Authorized Signature

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_