

ESTATE AND TRUST TAX COMPLIANCE SERVICES AGREEMENT

This Agreement is entered into and made effective as of _____, by and between:

Tax Services Provider:

Address: _____

Represented by: _____

Client:

Name of Estate/Trust: _____

Represented by (Executor/Trustee): _____

Address: _____

1. SCOPE OF SERVICES

The Provider agrees to perform federal and state tax compliance services for the Client as specified below:

1. Preparation of Federal Fiduciary Income Tax Return (Form 1041) for the tax year(s): _____
2. Preparation of State Fiduciary Income Tax Return(s) for the following jurisdiction(s): _____
3. Preparation of Schedule K-1s for distribution to beneficiaries.
4. Preparation of Federal Estate Tax Return (Form 706), if applicable: _____
5. Other services as mutually agreed upon in writing: _____

2. CLIENT RESPONSIBILITIES

The Client is responsible for providing the Provider with all necessary financial records, trust agreements, wills, inventory of assets, valuations, income statements, and other information required to accurately prepare the tax returns. The Client represents that all information provided is accurate and complete to the best of their knowledge.

3. FEES AND PAYMENT

The Client agrees to compensate the Provider for services rendered under the following terms:

Hourly Rate of \$_____ per hour, OR

Fixed Fee of \$_____ for the defined scope of services.

A retainer fee of \$_____ is required prior to the commencement of services. Invoices are payable upon receipt. Late payments may be subject to interest at a rate of _____% per month.

4. TERM AND TERMINATION

This Agreement shall commence on the date first written above and shall continue until the completion of the tax filings for the specified tax year(s), unless terminated earlier by either party with _____ days written notice. Upon termination, Client shall pay Provider for all services performed up to the date of termination.

5. CONFIDENTIALITY

The Provider agrees to keep all financial and personal information obtained during the performance of these services strictly confidential, in accordance with applicable professional standards and legal requirements.

6. 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.

PROVIDER

CLIENT

Signature

Signature

Printed Name

Printed Name

Title / Firm

Title (Executor / Trustee)

Date

Date