

ESTATE AND TRUST TAX COMPLIANCE SERVICES AGREEMENT

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

Service Provider: _____ ("Firm"), and

Client: _____ ("Client"), in their capacity as Executor, Administrator, Trustee, or Fiduciary of _____ ("Estate/Trust").

1. SCOPE OF SERVICES

The Firm will provide tax compliance and preparation services for the Estate/Trust as specified below:

- Preparation of Federal Form 1041 (U.S. Income Tax Return for Estates and Trusts) and applicable state fiduciary income tax returns for the tax year(s): _____.
- Preparation of Federal Form 706 (United States Estate and Generation-Skipping Transfer Tax Return) if applicable.
- Preparation of Federal Form 709 (United States Gift and Generation-Skipping Transfer Tax Return) if applicable.
- Preparation of Schedules K-1 for distribution to beneficiaries.

2. CLIENT RESPONSIBILITIES

The Client is responsible for providing all necessary documentation, financial records, trust agreements, wills, asset valuations, and income statements required to prepare the tax returns. The Client represents that all information provided is accurate and complete to the best of their knowledge. The Firm will not audit or independently verify the information submitted.

3. FEES AND BILLING

The fees for these services will be billed as follows:

Method of Compensation: _____

Retainer Required: \$ _____

Invoices are due and payable upon receipt. Late payments may result in the suspension of tax preparation services.

4. TERM AND TERMINATION

This Agreement shall commence on the date first written above and will terminate upon the completion and filing of the designated tax returns, unless terminated earlier by either party upon _____ days written notice.

5. LIMITATION OF LIABILITY

The Firm's liability for any claim, damage, or loss arising out of this Agreement shall be limited to the total fees paid by the Client to the Firm for the services rendered under this Agreement.

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 above written.

For the Firm:

For the Client:

Authorized Representative Signature

Fiduciary / Client Signature

Name: _____

Name: _____

Title: _____

Title/Capacity: _____

Date: _____

Date: _____