

STANDARD CPA CLIENT AGREEMENT

Engagement Letter for Accounting Services

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

Certified Public Accountant / Firm:

Address:

Contact:

And

Client:

Address:

Contact:

1. SCOPE OF SERVICES

The Client hereby engages the CPA to perform the following accounting and professional services (check all that apply):

- ☐ Monthly Bookkeeping and Financial Statement Preparation
- ☐ Annual Corporate Tax Return Preparation (Form _____)
- ☐ Individual Income Tax Return Preparation
- ☐ Payroll Administration and Filing
- ☐ Sales and Use Tax Compliance
- ☐ Financial Consulting and Advisory Services
- ☐ Other: _____

2. FEES AND BILLING

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

- ☐ **Hourly Rate:** Services will be billed at a rate of \$_____ per hour.
- ☐ **Fixed Fee:** A flat fee of \$_____ payable _____.
- ☐ **Retainer:** A non-refundable retainer of \$_____ is required prior to commencement of work.

Invoices are due upon receipt. Any balance unpaid after _____ days from the invoice date will be subject to a late fee of _____% per month.

3. CLIENT RESPONSIBILITIES

The Client is responsible for providing all necessary financial records, bank statements, receipts, and related information in a timely and organized manner. The CPA will not audit or otherwise verify the information submitted, and the accuracy of such information remains the sole responsibility of the Client.

4. CONFIDENTIALITY

The CPA agrees to keep all information obtained during the course of this engagement confidential and will not disclose any proprietary or personal information to third parties without the prior written consent of the Client, except as required by law.

5. TERM AND TERMINATION

This Agreement will begin on the date first written above and will remain in effect until the services are completed, or until terminated by either party upon _____ days written notice. Upon termination, the Client shall pay the CPA for all services rendered up to the date of termination.

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.

CPA / Representative:

Client:

Signature

Signature

Printed Name

Printed Name

Date

Date