

TAX PLANNING AND ADVISORY SERVICES AGREEMENT

This Tax Planning and Advisory Services Agreement (the "Agreement") is entered into and made effective as of _____ (the "Effective Date"), 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").

1. Scope of Services

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

1. Review and analysis of the Client's financial and tax records.
2. Development of tax planning strategies to minimize tax liabilities.
3. Advisory services regarding current and prospective tax laws, regulations, and their implications.
4. Ongoing consultations and updates on relevant tax matters.
5. Other services as mutually agreed upon in writing: _____

2. Client Responsibilities

The Client shall provide the Advisor with all necessary, accurate, and complete financial and tax information in a timely manner. The Advisor shall not be responsible for any consequences, penalties, or interest arising from inaccurate, incomplete, or late information provided by the Client.

3. Fees and Payment Terms

In consideration for the services rendered, the Client agrees to pay the Advisor as follows:

- **Hourly Rate / Flat Fee:** _____
- **Retainer:** A retainer of _____ shall be paid upon signing this Agreement.
- **Payment Schedule:** Invoices will be issued _____ and are due within _____ days of receipt.

4. Term and Termination

This Agreement shall commence on the Effective Date and shall continue _____ unless terminated earlier by either party. Either party may terminate this Agreement upon _____ days' written notice to the other party. Upon termination, the Client shall pay the Advisor for all services performed up to the effective date of termination.

5. Confidentiality

The Advisor agrees to maintain the absolute confidentiality of all financial information, personal data, and proprietary documents provided by the Client during the course of this engagement, in accordance with applicable legal and professional standards.

6. Limitation of Liability

The Advisor's liability for any claim arising out of or in connection with this Agreement shall be limited to the total fees paid by the Client to the Advisor under this Agreement. In no event shall the Advisor be liable for any indirect, incidental, or consequential damages.

7. Governing Law

This Agreement shall be governed by, and construed in accordance with, the laws of the State of _____, without regard to its conflict of law principles.

8. Entire Agreement

This Agreement constitutes the entire understanding between the parties and supersedes any prior oral or written agreements. Any amendments to this Agreement must be made in writing and signed by both parties.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the Effective Date.

ADVISOR:

CLIENT:

Authorized Signature

Print Name: _____

Title: _____

Date: _____

Authorized Signature

Print Name: _____

Title: _____

Date: _____