

TRUST ADMINISTRATION AND TAX COMPLIANCE AGREEMENT

This Trust Administration and Tax Compliance Agreement (the "Agreement") is entered into and made effective as of _____, by and between:

Trustee: _____

In their capacity as Trustee of the: _____ (the "Trust")

Address: _____

Tax Professional / Firm: _____

Address: _____

1. ENGAGEMENT OF SERVICES

The Trustee hereby engages the Tax Professional to perform professional fiduciary tax and administration compliance services on behalf of the Trust, and the Tax Professional hereby accepts such engagement subject to the terms and conditions set forth herein.

2. SCOPE OF SERVICES

The Tax Professional shall provide the following compliance and administrative services:

1. Preparation of Federal Fiduciary Income Tax Returns (IRS Form 1041) for the tax year(s): _____.
2. Preparation of State Fiduciary Income Tax Returns for the state(s) of: _____.
3. Preparation and issuance of Schedule K-1 forms to the beneficiaries of the Trust.
4. Review of trust governing documents, asset inventories, and prior tax returns to establish tax accounting methods and elections.
5. Ongoing consulting and tax advisory services related to trust distributions, principal and income allocations, and tax liability optimization as requested by the Trustee.

3. RESPONSIBILITIES OF THE TRUSTEE

The Trustee agrees to provide all financial records, accounting statements, banking transactions, appraisals, distribution records, and other documentation necessary for the preparation of the tax returns in a timely and complete manner. The Tax Professional will not audit or otherwise verify the information provided, and the Trustee remains solely responsible for the accuracy and completeness of the financial data.

4. COMPENSATION AND FEES

For services rendered under this Agreement, the Trustee agrees to compensate the Tax Professional as follows:

- Hourly rate of \$_____ per hour for tax preparation and advisory services.
- Fixed flat fee of \$_____ for standard fiduciary tax return filing.
- A retainer of \$_____ is required upon execution of this Agreement prior to the commencement of work.

5. TERM AND TERMINATION

This Agreement shall commence on the date first written above and shall continue until the completion of the tax filing services for the specified tax year(s), unless terminated earlier by either party upon _____ days written notice. In the event of early termination, the Tax Professional shall be compensated for all services performed up to the date of termination.

6. CONFIDENTIALITY

The Tax Professional shall maintain strict confidentiality with respect to all information, documentation, and financial details obtained regarding the Trust, the Trustee, and the beneficiaries, in accordance with applicable professional standards and legal requirements.

7. GOVERNING LAW

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

8. ENTIRE AGREEMENT

This document constitutes the entire agreement between the parties and supersedes any prior understanding or representation of any kind preceding the date of this Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first written above.

Signature of Trustee

Signature of Authorized Representative (Tax Professional/Firm)

Printed Name of Trustee

Printed Name & Title of Representative

Date

Date