

CLIENT AGREEMENT

Tax Planning & Consultation Services

This Agreement is entered into and made effective as of _____, 20, by and between the parties designated below:

1. THE PARTIES

Service Provider:

Company/Provider Name: _____

Representative Name: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

Client:

Individual/Entity Name: _____

Representative Name (if applicable): _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

2. SCOPE OF SERVICES

The Service Provider agrees to perform professional tax planning, advisory, and consultation services as detailed below.

3. FEES AND PAYMENT TERMS

- Service Fee:** The Client agrees to pay the Service Provider a fee of \$_____ per _____ for the performance of the services detailed in this Agreement.
- Retainer:** A non-refundable retainer fee of \$_____ is required upon execution of this Agreement, which shall be applied toward final billings.
- Invoicing:** Invoices will be issued _____. Payment is due within _____ days of the invoice date.
- Late Payments:** Late payments will accrue interest at a rate of % per month on outstanding balances.

4. CLIENT RESPONSIBILITIES

The Client agrees to provide the Service Provider with all necessary, accurate, and complete financial records, tax documents, and information required to perform the services in a timely manner. The Service Provider is not responsible for tax liabilities, penalties, or interest resulting from inaccurate, incomplete, or late information provided by the Client.

5. CONFIDENTIALITY

Both parties agree to maintain the strict confidentiality of all proprietary or personal information received from the other party

during the course of this engagement. Confidential information shall not be disclosed to any third party without prior written consent, except as required by law.

6. TERM AND TERMINATION

This Agreement shall commence on the date first written above and shall continue until the services are completed or unless terminated by either party. Either party may terminate this Agreement upon _____ days written notice to the other party. Upon termination, the Client shall pay the Service Provider for all services performed up to the date of termination.

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 regarding the subject matter hereof and supersedes all prior agreements, representations, or understandings, whether written or oral. Any modifications to this Agreement must be made in writing and signed by both parties.

Service Provider:

Client:

AUTHORIZED SIGNATURE

AUTHORIZED SIGNATURE

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____