

ESTATE AND TRUST TAX PREPARATION SERVICES AGREEMENT

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

Tax Services Provider:

Name/Firm: _____

Address: _____

Representative: _____

And

Fiduciary / Client:

Name: _____

Capacity: _____ (Executor / Administrator / Trustee)

Address: _____

For the following Estate / Trust entity:

Name of Entity: _____

Federal Employer Identification Number (FEIN): _____

1. SCOPE OF SERVICES

The Tax Services Provider will prepare the following federal and state tax returns for the tax year ending _____:

- U.S. Income Tax Return for Estates and Trusts (Form 1041)
- State Income Tax Return(s) for Estates and Trusts for the State(s) of: _____
- Schedule K-1 (Form 1041) for distribution to beneficiaries
- Other returns as specified: _____

2. FEES AND BILLING

The Fiduciary agrees to pay for services rendered under this Agreement as follows:

Standard Rate: \$_____ per _____ or a fixed fee of \$_____.

A retainer of \$_____ is required upon the signing of this Agreement. All invoices are due and payable within _____ days of presentation.

3. CLIENT RESPONSIBILITIES

The Fiduciary is responsible for providing all necessary financial records, governing documents (including the Will, Trust Agreement, and amendments), bank statements, accounting ledgers, and inventory of assets. The Tax Services Provider will not audit or verify the information provided, and the validity and accuracy of the tax returns remain the ultimate responsibility of the Fiduciary.

4. TERMS OF ENGAGEMENT

This engagement only covers the preparation of the specified returns. Any audit representation, amended returns, or responses to tax authority inquiries are outside the scope of this Agreement and will be billed under a separate engagement agreement.

5. 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.

TAX SERVICES PROVIDER:

FIDUCIARY / CLIENT:

Signature

Signature

Printed Name / Title

Printed Name / Title

Date

Date