

FIDUCIARY INCOME TAX RETURN PREPARATION AGREEMENT

Agreement for Estate and Trust Tax Compliance

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

Tax Preparer: _____

and

Fiduciary (Executor / Trustee): _____

acting on behalf of the following Entity (Estate / Trust): _____

1. SCOPE OF SERVICES

The Tax Preparer will prepare the following fiduciary income tax returns for the tax year ending _____:

- Federal Form 1041 (U.S. Income Tax Return for Estates and Trusts)
- State Fiduciary Income Tax Return(s) for the state of: _____
- Schedule K-1 (Form 1041) for distribution to beneficiaries

This agreement does not include any other tax services, audit representation, or estate planning advice unless separately agreed upon in writing.

2. FIDUCIARY RESPONSIBILITIES

The Fiduciary is responsible for providing all necessary financial records, income statements, expense receipts, governing documents (including Wills, Trust Agreements, and amendments), and any other relevant information required to accurately prepare the returns. The Fiduciary represents that all information provided is complete, accurate, and truthful to the best of their knowledge.

3. FEES AND PAYMENT

Fees for the preparation of the tax returns will be billed at _____. A deposit of \$ _____ is required prior to the commencement of work. The balance is due upon presentation of the completed returns and prior to electronic filing or delivery of paper returns.

4. TIMING AND DEADLINES

The Tax Preparer will make every reasonable effort to complete the returns by the applicable filing deadline. However, this is contingent upon the Fiduciary providing all necessary documents no later than _____. If information is received after this date, an extension of time to file may be required.

5. CONFIDENTIALITY

All information provided by the Fiduciary will be kept strictly confidential and will not be disclosed to any third parties without written authorization, except as required by law.

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

Tax Preparer:

Signature

Printed Name: _____

Date: _____

Fiduciary:

Signature

Printed Name: _____

Date: _____