

BUSINESS TAX FILING AND PLANNING AGREEMENT

This Business Tax Filing and Planning Agreement (hereinafter referred to as the "Agreement") is entered into and made effective as of _____, 20_____, by and between:

PROVIDER:

Address: _____

CLIENT:

Address: _____

Provider and Client may collectively be referred to as the "Parties" or individually as a "Party."

1. SCOPE OF SERVICES

The Provider agrees to perform professional corporate tax services for the Client as specified below:

- A. **Tax Preparation and Filing:** Preparation and federal, state, and local filing of the Client's corporate tax returns for the fiscal/calendar year ending _____.
- B. **Tax Planning:** Strategic tax planning and consultation sessions to optimize the Client's tax position for the upcoming financial periods.
- C. **Additional Services:** Any additional financial or advisory services requested by the Client shall be subject to a separate written addendum or billed at the hourly rate specified herein.

2. FEES AND PAYMENT TERMS

- A. The Client agrees to pay the Provider a flat fee of \$_____ for the standard tax filing services.
- B. Tax planning and consulting services outside the standard filing scope shall be billed at an hourly rate of \$_____ per hour.
- C. A retainer of \$_____ is due upon the execution of this Agreement. Balance payments are due within _____ days of receipt of invoice.

3. CLIENT RESPONSIBILITIES AND INFORMATION DELIVERY

- A. The Client is solely responsible for the accuracy, completeness, and truthfulness of all financial records, source documents, and information provided to the Provider.
- B. The Client must deliver all necessary financial documents and records to the Provider no later than _____. The Provider cannot guarantee timely filing of tax returns if records are received after this date.

4. TERM AND TERMINATION

This Agreement shall commence on the effective date and will terminate upon completion of the filing of the specified tax returns and payment of all outstanding fees. Either Party may terminate this Agreement by providing _____ days written notice to the other Party.

5. CONFIDENTIALITY AND DATA SECURITY

The Provider agrees to keep all financial and personal information of the Client strictly confidential and to employ industry-standard

data protection measures to secure the Client's proprietary financial data.

6. 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.

IN WITNESS WHEREOF, the Parties hereto have executed this Business Tax Filing and Planning Agreement as of the effective date written above.

PROVIDER:

Signature

Printed Name

Title

Date

CLIENT:

Signature

Printed Name

Title

Date