

PROFESSIONAL ENGAGEMENT AGREEMENT

TAX PLANNING AND ADVISORY SERVICES

Date:

Client Name:

Address:

Tax Year(s):

Dear _____,

This letter confirms the terms of our engagement and outlines the nature and limitations of the tax planning and advisory services we will provide.

1. SCOPE OF SERVICES

We will provide professional tax planning and advisory services for the tax year(s) specified above. Our services will include:

1. Analyzing financial and tax information provided by you to identify tax-saving opportunities.
2. Formulating tax strategies and recommendations aligned with your financial objectives.
3. Advising on the tax implications of specific transactions as requested.
4. Consulting on changes in tax legislation that may affect your tax position.

These services do not include tax preparation, audit representation, or compilation/review of financial statements unless explicitly agreed upon in writing under a separate engagement.

2. CLIENT RESPONSIBILITIES

To perform our services effectively, you agree to:

1. Provide complete, accurate, and timely financial documentation and information necessary for tax analysis.
2. Disclose all relevant facts, including any ongoing tax audits or disputes with tax authorities.
3. Keep us informed of significant financial decisions or changes in your circumstances.

We will not audit or verify the information you submit, and our work cannot be relied upon to discover errors, fraud, or other irregularities.

3. PROFESSIONAL FEES AND BILLING

Our fees for these services will be billed as follows:

- Hourly Rate: _____ per hour, or
- Fixed Project Fee: _____, or

- Retainer: _____ due upon execution of this agreement.

Invoices are due and payable upon receipt. Any unpaid balances outstanding past _____ days will accrue interest at a rate of _____% per month.

4. CONFIDENTIALITY AND LIMITATION OF LIABILITY

We will maintain the confidentiality of all information provided to us in connection with this engagement, in accordance with applicable professional standards and law. Our liability for any claim arising out of this engagement shall be limited to the total amount of fees paid to us for the services rendering giving rise to the liability.

5. TERMINATION

Either party may terminate this agreement at any time by providing written notice. Upon termination, you agree to pay for all professional hours and expenses incurred up to the date of termination.

Please confirm your acceptance of these terms by signing and returning a copy of this letter.

Accepted by (Client):

Signature

Print Name: _____

Title: _____

Date: _____

Accepted by (Advisor):

Signature

Firm/Advisor Name: _____

Title: _____

Date: _____