ANNUAL TAX PREPARATION RETAINER AGREEMENT

Professional Services Contract

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

Provider: _____

Address: _____

Phone: _____ Email: _____

Client: _____

Address: _____

Phone: _____ Email: _____

1. SCOPE OF SERVICES

The Provider agrees to perform annual tax preparation and advisory services for the Client during the term of this Agreement. Authorized services shall include:

1. Preparation of federal, state, and local income tax returns for the tax year _____.
2. Review of financial documents, receipts, and ledger items provided by the Client.
3. Annual tax planning consultation, up to _____ hours.
4. Electronic filing of all approved tax returns.

2. RETAINER AND FEES

In consideration for the services outlined above, the Client agrees to pay an annual retainer fee in the amount of $_____.

1. The retainer fee is due in full upon the execution of this Agreement.
2. Any work exceeding the scope of this Agreement will be billed at an additional hourly rate of $_____ per hour, subject to prior written approval from the Client.
3. Out-of-pocket expenses, including filing fees, courier charges, and software direct costs, will be billed separately and are not covered by the retainer.

3. CLIENT OBLIGATIONS

The Client agrees to provide all necessary financial records, receipts, statements, and information required for accurate tax preparation no later than _____. The Provider shall not be held liable for late filing fees, interest, or penalties resulting from the Client's failure to deliver complete documents in a timely manner.

4. TERM AND TERMINATION

This Agreement shall commence on the effective date and shall remain in effect for a period of one (1) year. Either party may terminate this Agreement upon _____ days written notice to the other party. If terminated by the Client prior to the completion of services, the Provider shall retain a prorated portion of the retainer based on actual hours worked.

5. GOVERNING LAW

This Agreement shall be construed, interpreted, and governed by the laws of the State of _____, without giving effect to conflict of laws principles.

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

PROVIDER SIGNATURE	CLIENT SIGNATURE
PRINTED NAME	PRINTED NAME
DATE	DATE