

QUARTERLY TAX RETAINER AND COMPLIANCE SERVICES AGREEMENT

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

Service Provider: _____, with a principal place of business at _____ (hereinafter referred to as the "Provider"), and

Client: _____, with a principal address/residence at _____ (hereinafter referred to as the "Client").

1. SCOPE OF SERVICES

The Provider agrees to perform professional tax compliance and advisory services on a quarterly retainer basis. The scope of services shall include:

1. Quarterly review of financial records, profit and loss statements, and balance sheets for tax compliance purposes.
2. Calculation and preparation of quarterly estimated federal, state, and local income tax liabilities.
3. Preparation and timely filing of quarterly sales tax, payroll tax, or other localized business filings as applicable:
_____.
4. Ongoing quarterly tax planning consultations, not to exceed _____ hours per quarter.

2. RETAINER FEE AND PAYMENT TERMS

In consideration for the services described herein, the Client agrees to pay a recurring quarterly retainer fee under the following terms:

1. **Quarterly Retainer Fee:** The Client shall pay a flat fee of \$ _____ per calendar quarter.
2. **Payment Schedule:** The retainer fee is due in advance on or before the _____ day of the first month of each calendar quarter (January, April, July, and October).
3. **Additional Services:** Any services requested by the Client outside the scope of this Agreement will be billed at an hourly rate of \$ _____ per hour, subject to prior written approval by the Client.

3. CLIENT RESPONSIBILITIES

The Client shall timely provide all necessary financial books, records, receipts, and information required for the Provider to perform the quarterly duties. All documentation must be delivered to the Provider no later than the _____ day following the end of each calendar quarter. The Provider is not responsible for tax penalties or interest resulting from late, incomplete, or inaccurate information provided by the Client.

4. TERM AND TERMINATION

This Agreement shall commence on the effective date written above and shall continue on a quarter-to-quarter basis. Either party may terminate this Agreement at any time by providing _____ days written notice to the other party. Upon termination, any unpaid fees for services rendered up to the date of termination shall become immediately due and payable.

5. CONFIDENTIALITY

The Provider agrees to maintain the absolute confidentiality of all financial, personal, and business records provided by the Client, in accordance with applicable professional standards and legal regulations.

6. GOVERNING LAW

This Agreement shall be governed by, construed, and enforced 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 Quarterly Tax Retainer and Compliance Services Agreement as of the date first written above.

PROVIDER:

CLIENT:

Authorized Signature

Authorized Signature

Printed Name:

Printed Name:

Title: _____

Title: _____

Date: _____

Date: _____