

**RETAINER AGREEMENT
FOR ACCOUNTING AND FINANCIAL ADVISORY SERVICES**

This Retainer Agreement (the "Agreement") is entered into and made effective as of _____, 20____, by and between:

Client: _____, with a principal place of business/residence at _____ (hereinafter referred to as the "Client"),

and

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

WHEREAS, Client desires to retain Advisor to perform professional accounting and financial advisory services, and Advisor agrees to perform such services under the terms and conditions set forth in this Agreement.

NOW, THEREFORE, in consideration of the mutual covenants contained herein, the parties agree as follows:

1. SCOPE OF SERVICES

Advisor agrees to provide the following professional accounting and financial advisory services to the Client:

2. RETAINER FEE AND PAYMENT TERMS

As consideration for the services to be performed by Advisor, Client agrees to pay a retainer fee under the following terms:

1. **Retainer Amount:** Client shall pay to Advisor a recurring retainer fee of \$_____ per _____.
2. **Payment Schedule:** The retainer fee shall be paid in advance on the _____ day of each period.
3. **Additional Hours:** In the event that the required services exceed _____ hours per period, additional services will be billed at an hourly rate of \$_____ per hour, subject to prior written approval by the Client.

3. TERM AND TERMINATION

This Agreement shall commence on _____, 20____, and shall continue:

- Until _____, 20_____.
- On a month-to-month basis until terminated by either party.

Either party may terminate this Agreement at any time, with or without cause, by providing _____ days written notice to the other party. Upon termination, Client shall pay Advisor for all services rendered up to the effective date of termination.

4. CONFIDENTIALITY

Advisor acknowledges that they will have access to proprietary and confidential information of the Client. Advisor agrees to keep all such information strictly confidential and shall not disclose it to any third party without the prior written consent of the Client, except

as required by law.

5. RELATIONSHIP OF PARTIES

The parties agree that Advisor is acting as an independent contractor and not as an employee, partner, or agent of the Client. Advisor is solely responsible for all taxes, withholdings, and insurance related to the services provided under this Agreement.

6. GOVERNING LAW

This Agreement shall be governed by, and construed in accordance with, the laws of the State of _____, without regard to conflict of law principles.

7. ENTIRE AGREEMENT

This Agreement constitutes the entire understanding between the parties with respect to the subject matter hereof and supersedes all prior agreements, oral or written.

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

CLIENT:

ADVISOR:

Authorized Signature

Authorized Signature

Printed Name

Printed Name

Title

Title

Date

Date