

# RETAINER CONTRACT FOR TAX CONSULTING AND COMPLIANCE

This Agreement is entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by and between:

**Tax Consultant:**

Name/Company: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Information: \_\_\_\_\_

And

**Client:**

Name/Company: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Information: \_\_\_\_\_

**1. SCOPE OF SERVICES**

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The Consultant agrees to provide professional tax consultation and planning services to the Client, which may include the following:

1. Ongoing tax planning and advisory services.
2. Preparation and review of tax filings and returns as mutually agreed.
3. Representation in matters before tax authorities, subject to separate written authorization if required.
4. Analysis of financial transactions for tax compliance and efficiency.

**2. RETAINER AND FEES**

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In consideration for the services provided, the Client agrees to pay the Consultant as follows:

1. **Retainer Fee:** A non-refundable monthly retainer fee of \$\_\_\_\_\_, payable on or before the \_\_\_\_\_ day of each calendar month.
2. **Hourly Rates:** Any services exceeding the scope covered by the retainer fee will be billed at an hourly rate of \$\_\_\_\_\_ per hour.
3. **Invoicing:** Additional fees will be invoiced monthly and are due within \_\_\_\_\_ days of the invoice date.

**3. TERM AND TERMINATION**

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This Agreement shall commence on \_\_\_\_\_, 20\_\_\_\_, and shall continue on a month-to-month basis until terminated. Either party may terminate this Agreement at any time by providing \_\_\_\_\_ days prior written notice to the other party.

**4. CLIENT RESPONSIBILITIES**

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The Client agrees to provide the Consultant with all necessary, accurate, and complete financial records, documents, and information in a timely manner. The Consultant is not responsible for tax penalties, interest, or other liabilities resulting from inaccurate, incomplete, or late information provided by the Client.

**5. CONFIDENTIALITY**

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The Consultant agrees to maintain the strict confidentiality of all financial and personal information provided by the Client and shall not disclose such information to any third party without the Client's prior written consent, except as required by law.

**6. GOVERNING LAW**

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This Agreement shall be governed by, and construed in accordance with, the laws of the State of \_\_\_\_\_.

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

**TAX CONSULTANT**

**CLIENT**

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Signature

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Signature

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Printed Name

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Printed Name

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Date

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Date