

STRATEGIC TAX PLANNING RETAINER SERVICES AGREEMENT

This Strategic Tax Planning Retainer Services Agreement (the "Agreement") is entered into and made effective as of _____, by and between:

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

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

1. Recitals

WHEREAS, the Consultant provides professional tax consultation, strategic tax planning, and advisory services; and
WHEREAS, the Client desires to retain the Consultant to perform strategic tax planning and consultation services on an ongoing retainer basis, and the Consultant agrees to perform such services under the terms and conditions set forth herein.

2. Scope of Services

The Consultant agrees to provide the following tax consultation and planning services to the Client:

1. Ongoing evaluation of the Client's financial profile to identify tax-saving opportunities.
2. Strategic advice regarding federal, state, and local tax implications of business and personal transactions.
3. Periodic consultation meetings as requested by the Client, not to exceed _____ hours per month.
4. Review of financial documents and tax returns prepared by third parties to ensure alignment with the established strategic tax plan.
5. Prompt updates regarding relevant changes in tax legislation, rules, and regulations that may impact the Client's financial position.

3. Retainer Fee and Payment Terms

1. **Retainer Fee:** The Client agrees to pay the Consultant a recurring monthly retainer fee of _____.
2. **Invoicing:** The monthly retainer fee shall be invoiced in advance on the _____ day of each month.
3. **Payment Terms:** All payments are due within _____ days of the invoice date. Late payments shall be subject to a fee of _____ % per month on outstanding balances.
4. **Additional Services:** Any services requested by the Client exceeding the scope outlined in Section 2, or exceeding the allocated monthly hour limit, shall be billed at an hourly rate of _____, subject to prior written approval by the Client.

4. Term and Termination

1. **Term:** This Agreement shall commence on _____ and shall continue on a month-to-month basis until terminated.
2. **Termination:** Either party may terminate this Agreement at any time, with or without cause, by providing _____ days written notice to the other party.
3. **Outstanding Fees:** Upon termination, the Client shall remain responsible for the payment of all services

rendered and monthly retainer allocations accrued up to the effective date of termination.

5. Client Responsibilities

The Client agrees to provide the Consultant with all necessary, accurate, and complete financial records, tax documents, and information required for the performance of the services. The Consultant shall not be held liable for any tax liabilities, penalties, interest, or missed opportunities resulting from inaccurate, incomplete, or delayed information provided by the Client.

6. Confidentiality

The Consultant agrees to hold all proprietary and financial information of the Client in strict confidence. The Consultant shall not disclose, reveal, or make use of any confidential information except as authorized by the Client or as required by governing legal authorities.

7. Limitation of Liability

To the maximum extent permitted by law, the Consultant's total liability for any claims, losses, damages, or expenses arising out of this Agreement shall be limited to the total amount of retainer fees paid by the Client to the Consultant during the _____ months immediately preceding the event giving rise to the liability.

8. Governing Law and Jurisdiction

This Agreement shall be construed, interpreted, and governed by the laws of the State of _____, without regard to its conflict of law principles. Any legal action arising under this Agreement shall be brought exclusively in the courts located in _____.

9. Entire Agreement

This Agreement constitutes the entire understanding between the parties regarding the subject matter hereof and supersedes all prior agreements, representations, or understandings, whether written or oral. Any amendments to this Agreement must be in writing and signed by both parties.

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

CONSULTANT:

CLIENT:

Signature

Signature

Printed Name

Printed Name

Title

Title

Date

Date

