

CERTIFIED PUBLIC ACCOUNTANT ADVISORY SERVICES RETAINER AGREEMENT

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

CPA Firm: _____, with a principal place of business at _____ (hereinafter referred to as the "CPA"),

and

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

1. ENGAGEMENT AND SCOPE OF SERVICES

The Client hereby retains the CPA, and the CPA agrees to provide professional advisory services to the Client. The scope of advisory services covered under this retainer includes the following:

- Strategic financial planning and business consulting;
- Periodic financial statement review and analysis;
- Tax planning and advisory support;
- Other consulting services as mutually agreed upon in writing.

This engagement is strictly for advisory services and does not include audit, review, or compilation services designed to express an opinion on financial statements, unless specifically agreed to in writing under a separate engagement letter.

2. RETAINER FEE AND COMPENSATION

In consideration for the services to be performed by the CPA, the Client agrees to pay compensation as follows:

- Initial Retainer:** The Client shall pay an initial non-refundable retainer fee of \$ _____ upon execution of this Agreement.
- Monthly Advisory Fee:** The Client shall pay a recurring monthly fee of \$ _____, due on the _____ day of each calendar month.
- Hourly Rates:** For services requested outside the standard scope of this retainer, billing will be charged at the CPA's standard hourly rate of \$ _____ per hour.

3. CLIENT RESPONSIBILITIES

The Client agrees to provide the CPA with all necessary financial records, documents, and information required to perform the advisory services. The CPA is entitled to rely on the accuracy and completeness of all information furnished by the Client. The Client is responsible for the safeguarding of assets and the accuracy of their internal books and records.

4. CONFIDENTIALITY

Both parties agree to maintain the strict confidentiality of all proprietary, financial, and personal information disclosed during the term of this engagement. The CPA shall not disclose any confidential information to third parties without the prior written consent of the Client, except as required by professional standards, law, or regulation.

5. TERM AND TERMINATION

This Agreement shall commence on _____ and shall continue on a month-to-month basis until terminated. Either party may terminate this Agreement at any time, with or without cause, by providing _____ days' prior written notice to the other party. Upon termination, the Client shall pay the CPA for all services rendered and expenses incurred up to the effective date of termination.

6. LIMITATION OF LIABILITY

The CPA's liability for any claim arising out of this Agreement shall be limited to the total amount of fees paid by the Client to the CPA under this Agreement during the _____ months preceding the event giving rise to the claim.

7. GOVERNING LAW

This Agreement shall be governed by, and construed 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 CPA Advisory Services Retainer Agreement as of the date first written above.

CPA / FIRM:

Authorized Signature

Printed Name

Title

Date

CLIENT:

Authorized Signature

Printed Name

Title

Date