

RETAINER AGREEMENT FOR ONGOING CPA CONSULTATION

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

CPA / Advisory Firm:

Name/Firm: _____

Address: _____

Email: _____

Phone: _____

(hereinafter referred to as the "CPA"),

and

Client:

Name/Entity: _____

Address: _____

Email: _____

Phone: _____

(hereinafter referred to as the "Client").

The CPA and the Client may collectively be referred to as the "Parties" or individually as a "Party."

1. Engagement and Scope of Services

The Client hereby engages the CPA, and the CPA agrees to provide ongoing professional accounting and advisory services to the Client. The scope of services under this retainer shall include the following ongoing consultation services:

1. _____
2. _____
3. _____
4. _____

Any services requested by the Client outside the scope of this ongoing advisory scope will be subject to a separate agreement or billed at the hourly rates outlined in Section 3.

2. Retainer Fee and Billing

In consideration for the ongoing services outlined in Section 1, the Client agrees to pay the CPA a recurring retainer fee. The terms of payment are as follows:

- **Retainer Amount:** \$_____ per _____.
- **Payment Schedule:** The retainer fee is due in advance on the _____ day of each billing cycle, starting on _____.
- **Included Hours:** This retainer covers up to _____ hours of consultation per billing cycle. Unused hours do not roll over to subsequent billing cycles.

3. Additional Services and Hourly Rates

For any services exceeding the allotted retainer hours or outside the scope defined in Section 1, the CPA will bill the Client at the following standard hourly rates:

- Partner/Principal Rate: \$_____ per hour
- Senior Advisory Rate: \$_____ per hour
- Staff Accountant Rate: \$_____ per hour

The CPA will obtain the Client's written approval prior to performing any services that would incur additional charges under this section.

4. Term and Termination

This Agreement shall commence on _____ and shall continue:

(Check one)

___ On a month-to-month basis until terminated by either party.

___ Until _____.

Either Party may terminate this Agreement at any time by providing _____ days' prior written notice to the other Party. Upon termination, the Client shall pay for all services rendered up to the effective date of termination.

5. Client Responsibilities and Disclosure

The CPA's advice and services depend entirely on the completeness and accuracy of the financial records, documents, and representations provided by the Client. The Client agrees to provide all required financial information, receipts, statements, and documentation in a timely manner. The CPA is not responsible for any errors, omissions, or penalties resulting from inaccurate or delayed information provided by the Client.

6. Confidentiality

The CPA agrees to keep all financial information, business operations details, and proprietary data of the Client strictly confidential and will not disclose such information to any third party without the Client's prior written consent, except as required by law or professional ethical standards.

7. Governing Law and Dispute Resolution

This Agreement shall be governed by, and construed in accordance with, the laws of the State of _____. Any disputes arising from this Agreement shall first be submitted to non-binding mediation before pursuing other legal remedies.

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

CPA / FIRM:

CLIENT:

(Authorized Representative Signature)

(Authorized Representative Signature)

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____