STRATEGIC CPA ADVISORY AND CONSULTING RETAINER CONTRACT

RETAINER AGREEMENT

This Strategic CPA Advisory and Consulting Retainer Contract (the "Agreement") is entered into and made effective as of ____________________, by and between:

CPA/Consulting Firm: ____ with a principal place of business at ____ (hereinafter referred to as the "Advisor"),

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 engages the Advisor, and the Advisor agrees to provide strategic CPA advisory and financial consulting services to the Client. The scope of services shall include, but is not limited to, the following:

1. Strategic financial planning, tax planning strategy, and corporate structuring guidance.
2. Regular review of financial statements, key performance indicators, and business performance metrics.
3. Periodic advisory meetings as mutually agreed upon, but no less than ____________ per month.
4. Ongoing financial consultation regarding business decisions, cash flow management, and capital allocation.
5. Other mutually agreed-upon financial advisory services.

2. TERM AND TERMINATION

This Agreement shall commence on ____________________ and shall continue on a month-to-month basis. Either party may terminate this Agreement at any time, with or without cause, by providing ______ days' prior written notice to the other party.

3. RETAINER FEES AND PAYMENT TERMS

In consideration for the advisory services, the Client agrees to pay the Advisor in accordance with the following terms:

1. **Monthly Retainer Fee:** The Client shall pay a non-refundable monthly retainer fee of $____________.
2. **Payment Due Date:** The monthly retainer is payable in advance on or before the ______ day of each calendar month.
3. **Hourly Overage Rate:** If the scope of services exceeds ______ hours in any given calendar month, additional services will be billed at an hourly rate of $__________ per hour, subject to prior notification to and approval by the Client.
4. **Late Payment:** Payments unpaid past ______ days from the due date shall accrue interest at a rate of ______% per month.

4. ACCESS TO INFORMATION AND ACCURACY

The Client agrees to provide the Advisor with all financial, business, and operational information necessary for the performance of the services in a timely, accurate, and complete manner. The Advisor shall be entitled to rely on the accuracy and completeness of all information, documents, and representations provided by the Client without independent verification.

5. CONFIDENTIALITY

The Advisor agrees to hold all non-public financial, operational, and proprietary information of the Client in strict confidence. The Advisor shall not disclose, copy, or distribute such information to any third party without the prior written consent of the Client, except as required by applicable professional standards, laws, regulations, or legal processes.

6. LIMITATION OF LIABILITY

The Advisor will perform services in accordance with applicable professional standards. The total liability of the Advisor for any claims, losses, damages, or expenses arising out of this Agreement, whether in contract, tort, or otherwise, shall not exceed the total amount of retainer fees paid by the Client to the Advisor during the ______ months immediately preceding the occurrence of the claim.

7. RELATIONSHIP OF PARTIES

The relationship of the Advisor to the Client is that of an independent contractor. Nothing in this Agreement shall be construed to create a partnership, joint venture, employer-employee, or agency relationship between the parties.

8. GOVERNING LAW AND JURISDICTION

This Agreement shall be governed by, construed, and enforced in accordance with 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 with respect to the subject matter hereof and supersedes all prior agreements, oral or written. Any modifications to this Agreement must be in writing and signed by both parties.

IN WITNESS WHEREOF, the parties hereto have executed this Strategic CPA Advisory and Consulting Retainer Contract as of the date first written above.

CLIENT:	**ADVISOR:**
______________________________	______________________________
By (Signature)	By (Signature)
______________________________	______________________________
Name (Printed)	Name (Printed)
______________________________	______________________________
Title	Title
______________________________	______________________________
Date	Date