ANNUAL TAX RETURN RETAINER AGREEMENT

This Agreement is entered into on this _____ day of _____, 20____, by and between:

Tax Professional / Firm: _____

Address: _____

and

Client: _____

Address: _____

1. Scope of Services

The Tax Professional agrees to provide annual tax preparation services for the Client for the tax year ending _____. These services include:

1. Preparation of federal, state, and local income tax returns based on information provided by the Client.
2. Review of financial documents and tax-related information provided by the Client.
3. Filing of completed and approved tax returns electronically or by mail as appropriate.

2. Retainer Fee & Payment Terms

The Client agrees to pay an annual retainer fee of $_____.

The retainer fee shall be paid in the following manner:

☐ Paid in full upon execution of this Agreement.

☐ Installment payments of $_____ due on _____.

This retainer fee is non-refundable and will be applied toward the total cost of the annual tax preparation services. Any additional work outside the scope of this Agreement will be billed at an hourly rate of $_____ per hour.

3. Client Responsibilities

The Client agrees to provide all necessary financial records, receipts, statements, and information required for the preparation of the tax returns in a timely manner, but no later than _____. The Tax Professional is not responsible for tax returns that are delayed or late due to the Client's failure to provide information on time.

4. Term and Termination

This Agreement shall begin on the date of execution and shall terminate upon the successful filing of the specified tax returns, unless terminated earlier by either party with _____ days' written notice.

5. Governing Law

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 Retainer Agreement as of the date first written above.

TAX PROFESSIONAL / FIRM	**CLIENT**
_____	_____
Signature	Signature
_____	_____
Printed Name	Printed Name
_____	_____
Date	Date