

# IRS REPRESENTATION AND TAX ADVOCACY AGREEMENT

This Agreement is entered into on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by and between:

**Client:**

Name/Entity: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**and**

**Representative:**

Name/Firm: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## 1. SCOPE OF REPRESENTATION

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The Client hereby retains the Representative to represent the Client before the Internal Revenue Service (IRS) and/or state tax authorities solely in connection with the following tax matters, tax years, or periods:

Tax Matter(s) / Form(s): \_\_\_\_\_

Tax Period(s) / Year(s): \_\_\_\_\_

Any services outside the scope specified above will require a separate written agreement executed by both parties.

## 2. POWER OF ATTORNEY

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The Client agrees to execute and deliver to the Representative Form 2848 (Power of Attorney and Declaration of Representative) and/or Form 8821 (Tax Information Authorization), or state equivalent forms, to enable the Representative to communicate with tax authorities and perform the services described under this Agreement.

## 3. FEES AND EXPENSES

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The Client agrees to compensate the Representative for services rendered in connection with this matter as follows:

A. **Retainer:** A non-refundable retainer of \$\_\_\_\_\_ is required upon execution of this Agreement, to be applied against hourly rates or flat fees as agreed.

B. **Fee Structure:** *(Check applicable box)*

**Hourly Rate:** Charged at \$\_\_\_\_\_ per hour.

**Flat Fee:** A flat fee of \$\_\_\_\_\_ for the scope defined in Section 1.

**Other:** \_\_\_\_\_

C. **Administrative & Out-of-Pocket Expenses:** The Client shall reimburse the Representative for all reasonable expenses incurred, including postage, overnight delivery, administrative filing fees, copy costs, and travel expenses.

## 4. CLIENT RESPONSIBILITIES AND COOPERATION

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The Client agrees to cooperate fully with the Representative, to provide all requested financial documents, tax records, and information truthfully and in a timely manner, and to make all payments required under this Agreement. The Representative is not responsible for penalties, interest, or adverse outcomes resulting from the Client's failure to provide accurate, complete, or timely information.

**5. TERM AND TERMINATION**

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This Agreement will terminate upon the conclusion of the scope of services described in Section 1, or upon written notice of termination by either party. Upon termination, the Client remains responsible for payment of all fees and expenses incurred up to the date of termination.

**6. GOVERNING LAW**

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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 Agreement as of the date first written above.

**CLIENT:**

**REPRESENTATIVE:**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name / Title

\_\_\_\_\_  
Printed Name / Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date