

PROFESSIONAL TAX CONSULTATION AND PLANNING RETAINER AGREEMENT

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

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

and

Client: _____, with a primary address of _____ (hereinafter referred to as the "Client").

1. SCOPE OF SERVICES

The Consultant agrees to provide professional tax consultation and planning services to the Client. The specific scope of services includes, but is not limited to, the following:

1. Ongoing strategic tax planning and advisory services.
2. Review of financial records and transaction structures for tax optimization.
3. Preparation and analysis of tax projections.
4. Consultation regarding changes in tax legislation and their potential impact on the Client.
5. Other tax-related advisory services as mutually agreed upon in writing.

2. RETAINER AND COMPENSATION

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

1. **Retainer Fee:** The Client shall pay a non-refundable initial retainer fee of \$_____ upon execution of this Agreement. This retainer shall be applied against future billings.
2. **Hourly / Flat Rate:** Services shall be billed at an hourly rate of \$_____ per hour, or a recurring periodic fee of \$_____ per _____.
3. **Billing Cycle:** Invoices will be rendered _____ and are due and payable within _____ days of the invoice date.

3. TERM AND TERMINATION

This Agreement shall commence on _____ and shall continue _____. Either party may terminate this Agreement at any time by providing _____ days written notice to the other party. Upon termination, the Client shall pay the Consultant for all services rendered up to the effective date of termination.

4. CLIENT RESPONSIBILITIES

The Client agrees to provide the Consultant with all necessary, accurate, and complete financial records, documents, and information required to perform the services in a timely manner. The Consultant is not responsible for tax liabilities, penalties, or interest resulting from inaccurate, incomplete, or late information provided by the Client.

5. CONFIDENTIALITY

The Consultant agrees to keep all financial and personal information obtained from the Client strictly confidential and shall not disclose such information to any third party without the Client's prior written consent, except as required by law.

6. LIMITATION OF LIABILITY

The Consultant's liability for any claims, damages, or losses arising out of this Agreement shall be limited to the total amount of fees paid by the Client to the Consultant 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 laws principles.

8. ENTIRE AGREEMENT

This Agreement constitutes the entire understanding between the parties concerning the subject matter hereof and supersedes all prior agreements, representations, or understandings, whether written or oral.

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

CLIENT:

TAX CONSULTANT:

SIGNATURE

SIGNATURE

PRINTED NAME

PRINTED NAME / TITLE

DATE

DATE