

STRATEGIC TAX ADVISORY AND PLANNING SERVICE CONTRACT

This Strategic Tax Advisory and Planning Service Contract (the "Agreement") is entered into and made effective as of _____, 20____, by and between:

Provider:

Entity Name: _____
Address: _____
Represented by: _____

And

Client:

Entity Name/Individual: _____
Address: _____
Represented by: _____

1. SCOPE OF SERVICES

The Provider agrees to perform strategic tax advisory and planning services for the Client. The scope of services shall include, but is not limited to, the following:

1. Analysis of current financial structures and historical tax positions.
2. Formulation of long-term tax mitigation and optimization strategies.
3. Ongoing consultation regarding regulatory changes, tax law updates, and potential liabilities.
4. Other advisory services as mutually agreed upon in writing, specifically:

2. FEES AND COMPENSATION

In consideration for the services rendered under this Agreement, the Client agrees to pay the Provider as follows:

1. Retainer Fee: A non-refundable retainer of \$ _____ due upon execution of this Agreement.
2. Service Fee Rate: \$ _____ per hour, or a flat project fee of \$ _____.
3. Payment Terms: Payments shall be made within _____ days of receipt of invoice.

3. TERM AND TERMINATION

This Agreement shall commence on the effective date and shall continue _____ unless terminated earlier by either party. Either party may terminate this Agreement at any time by providing _____ days written notice to the other party.

4. CONFIDENTIALITY AND PROPRIETARY INFORMATION

The Provider acknowledges that during the course of performing services, they will have access to confidential financial and business information of the Client. The Provider agrees to maintain strict confidentiality of all such information and shall not disclose it to any third party without prior written consent, except as required by law.

5. LIMITATION OF LIABILITY

The advice and planning strategies provided under this Agreement are based on tax laws, regulations, and administrative interpretations in effect as of the date of service. The Provider does not guarantee specific financial outcomes or tax savings. The Provider's total liability under this Agreement shall not exceed the total fees paid by the Client to the Provider under this Agreement.

6. GOVERNING LAW

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.

7. ENTIRE AGREEMENT

This Agreement constitutes the entire understanding between the parties and supersedes any prior agreements or understandings, written or oral, regarding the subject matter herein. Any modifications to this Agreement must be made in writing and signed by both parties.

IN WITNESS WHEREOF, the parties hereto have executed this Strategic Tax Advisory and Planning Service Contract as of the date first written above.

PROVIDER:

CLIENT:

Signature

Signature

Printed Name

Printed Name

Title

Title

Date

Date