

AGREEMENT FOR FIDUCIARY INCOME TAX RETURN PREPARATION

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

The Provider:

The Client:

_____, acting as Fiduciary (Trustee / Executor / Administrator) for:

Name of Estate or Trust: _____

Federal Employer Identification Number (FEIN): _____

1. SCOPE OF SERVICES

The Provider will prepare the following fiduciary income tax returns for the tax year ending _____:

1. Federal Form 1041 (U.S. Income Tax Return for Estates and Trusts) and associated Schedules K-1.
2. State Fiduciary Income Tax Return(s) for the State of _____ and _____.
3. Local or municipal fiduciary returns as specifically listed here: _____.

This agreement does not include the preparation of estate tax returns (Form 706), gift tax returns (Form 709), or any other tax filings unless explicitly agreed to in writing as an amendment to this agreement.

2. CLIENT RESPONSIBILITIES

The Client is responsible for providing all necessary financial records, trust agreements, wills, accounting statements, and other documentation required to prepare the tax returns. The Client represents that all information provided is accurate, complete, and truthful. The Provider will not audit or verify the information submitted, although clarification may be requested where necessary.

3. FEES AND PAYMENT TERMS

The fee for the services detailed above shall be determined as follows:

___ Flat fee of \$ _____

___ Hourly rate of \$ _____ per hour

An initial retainer of \$ _____ is required prior to the commencement of work. Final payment is due upon delivery of the completed returns and prior to electronic filing or mailing of physical copies.

4. TIMING AND DEADLINES

The Provider will make every reasonable effort to complete the returns by the statutory filing deadline. However, the Client must deliver all completed records and information to the Provider no later than _____. If information is received after this date, the Provider reserves the right to file an extension on behalf of the Estate or Trust, and additional fees may apply.

5. LIMITATION OF LIABILITY

The Client agrees that the Provider's liability for any errors, omissions, or negligence in the preparation of these tax returns is strictly limited to the amount of the professional fees paid under this agreement.

6. TERMINATION

Either party may terminate this agreement at any time by providing written notice. In the event of termination, the Client will be billed for all work completed up to the date of termination at the agreed rates.

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

FIDUCIARY SIGNATURE (CLIENT)

PROVIDER SIGNATURE

PRINTED NAME

PRINTED NAME / TITLE

DATE

DATE