

ANNUAL TAX CONSULTATION RETAINER AGREEMENT

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

Tax Consultant: _____

Address: _____

And

Client: _____

Address: _____

1. SCOPE OF SERVICES

The Consultant agrees to provide annual tax consultation and planning services to the Client, which shall include the following:

- Ongoing tax planning and advisory services throughout the calendar year.
- Review of financial records for the purpose of identifying tax savings opportunities.
- Quarterly consultation sessions scheduled at mutually agreeable times.
- Preparation and filing of the following annual tax returns: _____

2. TERM OF AGREEMENT

This Agreement shall commence on _____ and shall remain in effect for a period of one (1) year, terminating on _____, unless terminated earlier in accordance with the provisions herein.

3. RETAINER FEES & PAYMENT TERMS

In consideration for the services outlined in Section 1, the Client agrees to pay a non-refundable annual retainer fee of \$_____.

The retainer fee shall be payable in the following manner:

Any services requested by the Client outside the scope of this Agreement will be billed at an additional hourly rate of \$_____ per hour, subject to prior written authorization by the Client.

4. RESPONSIBILITIES OF THE CLIENT

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

5. CONFIDENTIALITY

The Consultant agrees to maintain the strict confidentiality of all financial, personal, and business information provided by the Client and shall not disclose any such information to third parties without the Client's prior written consent, except as required by law.

6. TERMINATION

Either party may terminate this Agreement by providing _____ days written notice to the other party. In the event of termination, the Consultant shall be compensated for all services rendered up to the date of termination.

7. 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 Agreement as of the date first written above.

Tax Consultant:

Client:

Signature

Signature

Printed Name

Printed Name

Date

Date