ANNUAL TAX PREPARATION RETAINER AGREEMENT

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

Tax Professional: _____
Address: _____

Client: _____
Address: _____

1. SCOPE OF SERVICES

The Tax Professional agrees to perform annual tax preparation and related consulting services for the Client, which shall include:

1. Preparation of federal, state, and local income tax returns for the tax year ending _____.
2. Review of financial documents, receipts, and statements provided by the Client.
3. Annual tax planning consultation sessions, not to exceed _____ hours per year.
4. Electronic filing of completed and approved tax returns.

2. RETAINER FEE AND PAYMENT TERMS

As consideration for the services details in Section 1, the Client agrees to pay a non-refundable annual retainer fee in the amount of $ _____.

1. The retainer fee is due in full upon the execution of this Agreement.
2. Any services exceeding the scope defined in Section 1 will be billed at an hourly rate of $_____ per hour, billed in increments of _____.
3. Out-of-pocket expenses, including filing fees, courier services, or specialized software licensing, shall be billed to the Client and are not covered by the initial retainer fee.

3. CLIENT RESPONSIBILITIES

The Client agrees to provide all necessary, accurate, and complete financial records, forms, and information required for the preparation of tax returns no later than _____. The Tax Professional is not responsible for tax return deficiencies, penalties, or interest resulting from inaccurate, incomplete, or late documentation provided by the Client.

4. TERM AND TERMINATION

This Agreement shall commence on the effective date and remain in effect for one (1) full year. Either party may terminate this Agreement upon _____ days written notice to the other party. In the event of termination, any work completed up to the date of termination will be billed at the standard hourly rate, and any remaining balance of the retainer fee will be handled in accordance with applicable professional standards.

5. CONFIDENTIALITY

The Tax Professional agrees to keep all information provided by the Client strictly confidential and shall not disclose any financial or personal details to any third party without the express written consent of the Client, except as required by law.

6. 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 Annual Tax Preparation Retainer Agreement as of the date first written above.

TAX PROFESSIONAL SIGNATURE	**CLIENT SIGNATURE**
PRINT NAME	**PRINT NAME**
DATE	**DATE**