

FINANCIAL ADVISORY AND ACCOUNTING SERVICES RETAINER AGREEMENT

This Financial Advisory and Accounting Services Retainer Agreement (the "Agreement") is entered into and made effective as of _____, by and between:

Provider: _____, with a principal place of business at _____ (hereinafter referred to as the "Advisor"),
and

Client: _____, with a principal place of business or residence at _____ (hereinafter referred to as the "Client").

WHEREAS, the Client desires to retain the Advisor to perform financial advisory and accounting services, and the Advisor agrees to perform such services under the terms and conditions set forth in this Agreement.

NOW, THEREFORE, in consideration of the mutual covenants contained herein, the parties agree as follows:

1. SCOPE OF SERVICES

The Advisor agrees to provide the following financial advisory and accounting services to the Client:

1. _____
2. _____
3. _____
4. _____

2. RETAINER AND FEES

In consideration for the services to be performed by the Advisor, the Client agrees to pay the following fees:

1. **Retainer Fee:** The Client shall pay a non-refundable monthly retainer fee of \$ _____ due on the _____ day of each calendar month.
2. **Hourly Rates:** For services exceeding the scope of the monthly retainer, the Advisor shall bill at a rate of \$ _____ per hour.
3. **Invoicing:** The Advisor will submit monthly invoices for any additional services, which shall be paid by the Client within _____ days of receipt.

3. TERM AND TERMINATION

This Agreement shall commence on _____ and shall continue on a _____ basis until terminated by either party. Either party may terminate this Agreement at any time, with or without cause, by providing _____ days written notice to the other party.

4. CLIENT COOPERATION AND INFORMATION

The Client agrees to provide the Advisor with all necessary financial records, documentation, and access to systems required to perform the services. The Advisor shall not be responsible for any errors or delays resulting from the Client's failure to provide accurate or timely information.

5. CONFIDENTIALITY

The Advisor agrees to hold all financial, business, and personal information of the Client in strict confidence and shall not disclose such information to any third party without the prior written consent of the Client, except as required by law.

6. LIMITATION OF LIABILITY

The Advisor's total liability for any claims, losses, damages, or expenses arising under this Agreement shall be limited to the total amount of fees paid by the Client to the Advisor during the _____ months immediately 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 and supersedes any prior agreements, representations, or understandings, whether written or oral. Any amendments to this Agreement must be made in writing and signed by both parties.

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

ADVISOR:

CLIENT:

Signature

Signature

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____