

QUARTERLY CORPORATE TAX COMPLIANCE RETAINER AGREEMENT

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

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

and

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

1. SCOPE OF SERVICES

The Advisor agrees to provide the following professional services on a quarterly basis:

- a. Review of the Client's quarterly financial records and transactions to ensure tax alignment.
- b. Preparation and calculation of quarterly estimated corporate income tax liabilities.
- c. Preparation and timely filing of quarterly corporate tax returns (Form _____ or equivalent local/state filing requirements).
- d. Quarterly tax planning consultations, not to exceed _____ hours per quarter.
- e. Representation and assistance with routine inquiries from tax authorities regarding the quarterly filings prepared under this Agreement.

2. RETAINER AND FEES

In consideration for the services outlined in Section 1, the Client agrees to pay fees in accordance with the following terms:

- a. **Quarterly Retainer Fee:** The Client shall pay a recurring quarterly retainer fee of \$_____.
- b. **Payment Schedule:** The retainer fee is due in advance on or before the _____ day of the first month of each calendar quarter (January 1, April 1, July 1, and October 1).
- c. **Out-of-Scope Services:** Any services requested by the Client that fall outside the defined Scope of Services shall be billed at an hourly rate of \$_____ per hour, subject to prior written authorization by the Client.

3. CLIENT OBLIGATIONS

To facilitate the timely and accurate performance of services, the Client agrees to:

- a. Provide all necessary financial records, bank statements, ledger details, and supporting documentation no later than _____ days following the end of each calendar quarter.
- b. Ensure the accuracy and completeness of all information provided to the Advisor. The Advisor is not responsible for tax penalties, interest, or liabilities resulting from inaccurate or incomplete information provided by the Client.

4. TERM AND TERMINATION

This Agreement shall commence on _____ and shall continue on a quarter-to-quarter basis. Either party may terminate this Agreement at any time by providing _____ days written notice to the other party. In the event of termination, the Client shall remain liable for payment of services rendered up to the effective date of termination.

5. CONFIDENTIALITY

Both parties agree to keep all financial, proprietary, and personal information obtained during the course of this engagement strictly confidential, except as required by law or authorized in writing.

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 Quarterly Corporate Tax Compliance Retainer Agreement as of the date first written above.

CLIENT:

ADVISOR:

Signature

Signature

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____