YEARLY TAX FILING RETAINER CONTRACT

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

Tax Professional: _____
Address: _____
Phone: _____ Email: _____

And

Client: _____
Address: _____
Phone: _____ Email: _____

1. SCOPE OF SERVICES

The Tax Professional agrees to provide annual tax preparation and filing services for the Client. These services shall include the preparation of the following tax returns for the tax year _____:

___ Federal Income Tax Return
___ State Income Tax Return(s) for the state(s) of: _____
___ Local Income Tax Return(s)
___ Other: _____

2. RETAINER FEE & PAYMENT TERMS

The Client agrees to pay the Tax Professional an annual retainer fee of $_____. This fee is due and payable as follows:

___ In full upon signing of this Agreement.
___ In installments of $_____ to be paid _____.

Any additional services outside the scope of this standard annual tax preparation will be billed separately at an hourly rate of $ _____ per hour.

3. CLIENT RESPONSIBILITIES

The Client is responsible for providing all necessary financial records, receipts, W-2s, 1099s, and any other relevant documentation required to complete the tax filings. All documentation must be provided to the Tax Professional no later than _____. The Tax Professional is not responsible for tax returns that are filed late due to the Client's failure to provide information in a timely manner.

4. TERM AND TERMINATION

This Agreement is valid for the tax year indicated above and will automatically renew for subsequent annual tax periods unless terminated in writing by either party at least _____ days prior to the end of the current tax year.

5. 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 Professional	**Client**
Signature	Signature
Printed Name	Printed Name
Date	Date