

ANNUAL TAX PREPARATION AND COMPLIANCE SERVICE AGREEMENT

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

Service Provider:

Address: _____

Client:

Address: _____

1. SCOPE OF SERVICES

The Service Provider agrees to perform annual tax compliance and preparation services for the Client for the tax year ending _____. The scope of services includes:

1. Preparation of federal, state, and local income tax returns based on financial information provided by the Client.
2. Review of financial statements, ledger entries, and supporting documentation solely for tax compliance purposes.
3. Filing of completed and signed tax returns through electronic filing (e-file) systems where applicable.
4. Advisory services directly related to the preparation of the specified returns.

2. CLIENT RESPONSIBILITIES

1. The Client is responsible for providing complete, accurate, and timely information, including all income, expenses, deductions, and supporting financial documentation, no later than _____.
2. The Service Provider will not audit or verify the information provided, and the Client remains legally responsible for the accuracy of the tax returns.
3. The Client is responsible for final review and approval of the tax returns prior to filing.

3. FEES AND PAYMENT

For services rendered, the Client agrees to pay the Service Provider according to the following terms:

- Base Fee: \$ _____
- Additional Hourly Rate (if applicable): \$ _____ per hour
- Retainer/Deposit: \$ _____ due upon signing.

Payment is due within _____ days of receiving the final draft of the tax returns. The Service Provider reserves the right to withhold submission of the returns until full payment is received.

4. TERM AND TERMINATION

This Agreement shall begin on the date of execution and will remain in effect until the completion of filing services for the specified tax year, unless terminated earlier by either party with _____ days written notice.

5. CONFIDENTIALITY AND DATA PROTECTION

The Service Provider agrees to maintain the strict confidentiality of all financial and personal information provided by the Client, in compliance with applicable professional standards and legal requirements.

6. LIMITATION OF LIABILITY

The Service Provider's liability for any errors, omissions, or negligence in the preparation of tax returns shall be limited to the total fees paid by the Client under this Agreement. The Service Provider is not liable for any interest or penalties resulting from late, incomplete, or inaccurate information provided by the Client.

IN WITNESS WHEREOF, THE PARTIES HERETO HAVE EXECUTED THIS AGREEMENT:

SERVICE PROVIDER:

CLIENT:

Authorized Signature

Authorized Signature

Printed Name

Printed Name

Title

Title (if signing for an entity)

Date

Date