RECURRING TAX PREP SERVICES RETAINER AGREEMENT

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

Provider:
Name/Company: _____
Address: _____
Email: _____

Client:
Name/Company: _____
Address: _____
Email: _____

1. SCOPE OF SERVICES

The Provider agrees to perform recurring annual tax preparation and related advisory services for the Client. The scope of services includes the following recurring deliverables:

_____

_____

_____

2. RETAINER FEE & PAYMENT TERMS

In consideration for the recurring services, the Client agrees to pay the Provider a recurring retainer fee according to the schedule below:

Frequency (e.g., Monthly, Quarterly, Annually)	Retainer Amount ($)	Payment Due Date

Payments shall be made via _____. Late payments may result in the suspension of services or a late fee of _____.

3. CLIENT RESPONSIBILITIES & INFORMATION DISCLOSURE

The Client agrees to provide all necessary financial records, receipts, statements, and other required information in a timely manner, no later than _____ days prior to any tax filing deadline. The Provider is not responsible for penalties, interest, or missed deadlines resulting from the Client's failure to provide accurate and complete information on time.

4. TERM AND TERMINATION

This Agreement shall commence on the effective date and will automatically renew for successive annual periods unless either party provides written notice of non-renewal at least _____ days prior to the end of the current term. Either party may terminate this Agreement with _____ days written notice. In the event of termination, any unpaid fees for work completed up to the termination date shall become immediately due.

5. GOVERNING LAW

This Agreement shall be governed by and construed in accordance with the laws of the State of _____.

6. ENTIRE AGREEMENT

This document constitutes the entire agreement between the parties and supersedes any prior understandings or written or oral agreements regarding the subject matter herein.

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

PROVIDER:	**CLIENT:**
_____	_____
Signature	Signature
_____	_____
Printed Name	Printed Name
_____	_____
Date	Date