FIDUCIARY TAX COMPLIANCE ENGAGEMENT AGREEMENT

ESTATE AND TRUST TAX SERVICES

This Engagement Agreement (the "Agreement") is entered into this ______ day of ______________, 20____, by and between:

Tax Professional / Firm: ____ ("Firm")

and

Fiduciary / Client: ____ ("Fiduciary"), acting in their capacity as Executor, Administrator, or Trustee of the following Estate or Trust:

Name of Estate or Trust: ____ ("the Trust/Estate").

1. SCOPE OF SERVICES

The Firm agrees to prepare the federal and state income tax returns for the Trust/Estate for the tax year ending________________ . Specifically, the Firm will prepare the following forms (check all that apply):

[ ] U.S. Income Tax Return for Estates and Trusts (Form 1041)
[ ] State Fiduciary Income Tax Return(s) for the State(s) of: ____________________________
[ ] Schedule K-1 (Form 1041) for distribution to beneficiaries
[ ] Trust/Estate Allocation or Accounting Schedules as required
[ ] Other: ____

This engagement is limited strictly to the tax compliance services specified above. No other services, including estate planning, financial planning, or litigation support, are included unless agreed upon in writing.

2. FIDUCIARY RESPONSIBILITIES

The Fiduciary is responsible for providing the Firm with all necessary information, records, governing trust agreements, wills, accounting statements, asset valuations, and income details relevant to the preparation of the tax returns. The Fiduciary represents that all information provided is accurate and complete to the best of their knowledge. The Firm will not audit or otherwise verify the information submitted, although clarification may be requested.

3. FEES AND BILLING

Professional fees for the services outlined herein shall be determined as follows:

[ ] Fixed Fee of $__________
[ ] Hourly Rate of $________ per hour, billed in increments of__________
[ ] Retainer of $__________, due upon execution of this Agreement

Invoices are due and payable upon receipt. Out-of-pocket expenses, including delivery fees and filing fees, will be billed separately.

4. TERM AND TERMINATION

This Agreement will remain in effect until the completion of the tax filing services for the specified tax period, unless terminated earlier by either party upon ______ days' written notice. In the event of early termination, the Fiduciary agrees to compensate the Firm for all services rendered and expenses incurred up to the date of termination.

5. CONFIDENTIALITY AND RETENTION OF RECORDS

The Firm will maintain the confidentiality of all client information in accordance with applicable professional standards and legal regulations. The Firm will retain records related to this engagement for a period of______ years, after which the files may be destroyed.

6. 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.

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

FIDUCIARY / CLIENT:	**TAX PROFESSIONAL / FIRM REPRESENTATIVE:**
______________________________	______________________________
Signature	Signature
Printed Name: ____________________	Printed Name: ____________________
Title: ____________________	Title: ____________________
Date: ____________________	Date: ____________________