

IRS REPRESENTATION AND DISPUTE RESOLUTION AGREEMENT
TAX DEFENSE & REPRESENTATION SERVICES

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

1. PARTIES

Tax Practitioner / Firm:

Name/Firm: _____

Address: _____

Representative Name: _____

Client:

Name(s): _____

Address: _____

Taxpayer Identification Number(s) (Last 4 digits): _____

2. SCOPE OF SERVICES

The Practitioner agrees to represent the Client before the Internal Revenue Service (IRS) in connection with the following tax matters (check and complete all that apply):

Audit / Examination Representation for Tax Year(s): _____

Collection Due Process / Collection Appeals for Tax Year(s): _____

Offer in Compromise (OIC) for Tax Year(s): _____

Penalty Abatement Request for Tax Year(s): _____

Installment Agreement Negotiations for Tax Year(s): _____

Other Tax Dispute Resolution Services: _____

The scope of this agreement is strictly limited to the matters designated above. Any representation for subsequent years, state/local tax authorities, or litigation in federal courts will require a separate written agreement.

3. CLIENT'S OBLIGATIONS

The Client agrees to:

1. Provide full, accurate, and timely disclosure of all facts, documents, financial records, and correspondence received from the IRS.
2. Execute IRS Form 2848 (Power of Attorney and Declaration of Representative) or Form 8821 (Tax Information Authorization) immediately upon request.
3. Cooperate fully with all reasonable requests made by the Practitioner during the course of representation.
4. Pay all fees and costs as specified in Section 4 of this Agreement.

4. FEES, BILLING, AND RETAINER

The Client agrees to compensate the Practitioner for services rendered under the following payment structure:

Retainer: A non-refundable initial retainer of \$ _____ is required upon execution of this Agreement, to be applied against hourly fees or fixed costs.

Hourly Rate: Professional services will be billed at an hourly rate of \$ _____ per hour. Bills will be issued monthly and are due upon receipt.

Flat Fee: A flat fee of \$ _____ payable according to the following schedule:

Additional Costs: The Client is responsible for any administrative costs, including but not limited to overnight courier fees, filing fees, copying costs, and transcription fees.

5. LIMITATIONS OF OUTCOMES

The Client acknowledges that the Practitioner has made no guarantees or promises regarding the outcome of the dispute resolution process or negotiations with the IRS. All assessments, projections, or discussions of potential outcomes are estimates based on professional experience and current tax law.

6. TERMINATION OF AGREEMENT

Either party may terminate this Agreement at any time by providing written notice to the other party. Upon termination, Client shall remain liable for all fees and expenses incurred up to the effective date of termination. Practitioner reserves the right to withdraw from representation if Client fails to cooperate, fails to pay fees, or provides false or misleading information.

7. DISPUTE RESOLUTION

Any dispute arising out of or relating to this Agreement, including billing disputes, shall be resolved through binding arbitration in the state of _____ in accordance with the rules of the American Arbitration Association.

8. AUTHORIZATION AND SIGNATURES

By signing below, the parties acknowledge that they have read, understood, and agreed to be bound by the terms and conditions of this Agreement.

Client Signature:

Practitioner Signature:

Signature

Signature

Print Name: _____

Print Name: _____

Date: _____

Date: _____

Joint Client Signature (if applicable):

Signature

Print Name: _____

Date: _____