

QUARTERLY TAX COMPLIANCE RETAINER AGREEMENT

This Quarterly Tax Compliance Retainer Agreement (the "Agreement") is entered into and made effective as of _____, 20_____, by and between:

Service Provider: _____ with a principal place of business at _____ (hereinafter referred to as the "Provider"), and

Client: _____ with a principal address at _____ (hereinafter referred to as the "Client").

1. SCOPE OF SERVICES

The Provider agrees to perform the following quarterly tax compliance and advisory services for the Client:

1. Review of quarterly financial records and transactions to ensure tax compliance.
2. Calculation and preparation of estimated quarterly federal, state, and local income tax liabilities.
3. Preparation and timely filing of quarterly tax returns, including but not limited to sales tax, use tax, and payroll tax returns, as applicable.
4. Ongoing tax consultation and advisory services, limited to _____ hours per quarter.

2. RETAINER FEE AND PAYMENT TERMS

1. **Retainer Fee:** The Client agrees to pay the Provider a recurring quarterly retainer fee of \$ _____.
2. **Payment Schedule:** The quarterly retainer shall be paid in advance, due on or before the _____ day of the first month of each calendar quarter (January, April, July, and October).
3. **Additional Services:** Any services requested by the Client that fall outside the defined Scope of Services in Section 1 will be billed at an hourly rate of \$ _____ per hour, subject to prior written approval by the Client.

3. CLIENT RESPONSIBILITIES

The Client agrees to provide all necessary financial records, bank statements, receipts, and related documentation to the Provider no later than the _____ day following the end of each calendar quarter. The Provider shall not be held liable for tax penalties, interest, or late filings resulting from the Client's failure to provide complete and accurate information in a timely manner.

4. TERM AND TERMINATION

1. **Term:** This Agreement shall commence on the effective date and shall continue on a quarter-to-quarter basis until terminated by either party.
2. **Termination:** Either party may terminate this Agreement at any time, with or without cause, by providing _____ days written notice to the other party. Any unpaid fees for services rendered up to the termination date shall become immediately due and payable.

5. CONFIDENTIALITY

The Provider agrees to keep all financial information, records, and personal data of the Client strictly

confidential and shall not disclose such information to any third party without the Client's prior written consent, except as required by law.

6. GOVERNING LAW

This Agreement shall be governed by, construed, and enforced in accordance with the laws of the State of _____, without regard to its conflict of law principles.

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

PROVIDER:

CLIENT:

Signature

Signature

Printed Name

Printed Name

Title

Title

Date

Date