ANNUAL TAX PREPARATION RETAINER AGREEMENT

This Agreement is entered into and made effective as of _____, by and between:

Provider: _____

Client: _____

1. SCOPE OF SERVICES

The Provider agrees to perform professional annual tax preparation and related consulting services for the Client for the tax year _____. These services shall specifically include:

1. Preparation of federal, state, and local income tax returns for the Client.
2. Review of financial documents, statements, and receipts provided by the Client.
3. Standard tax planning consultations up to _____ hours per year.
4. Electronic filing of all completed and approved tax returns.

2. RETAINER AND FEES

The Client agrees to pay the Provider a non-refundable annual retainer fee of $_____. This retainer is due and payable upon the execution of this Agreement.

Any services requested by the Client that fall outside the scope of this Agreement will be billed at the Provider's standard hourly rate of $ _____ per hour, subject to prior written authorization by the Client.

3. CLIENT RESPONSIBILITIES

The Client is responsible for providing all necessary financial information, records, receipts, and documents required for the accurate preparation of the tax returns. All such information must be delivered to the Provider no later than _____. The Provider is not responsible for any penalties, interest, or late fees resulting from the Client's failure to provide information in a timely manner.

4. TERM AND TERMINATION

This Agreement shall commence on the effective date and shall remain in effect for a period of one (1) year. Either party may terminate this Agreement upon _____ days written notice to the other party. In the event of termination, any outstanding balances for services rendered up to the date of termination shall become immediately due and payable.

5. LIMITATION OF LIABILITY

The Provider's liability for any errors, omissions, or negligence in the preparation of tax returns under this Agreement shall be limited to the maximum extent of the total retainer fee paid by the Client to the Provider under this Agreement.

6. GOVERNING LAW

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

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

PROVIDER:

SIGNATURE

PRINT NAME

DATE

CLIENT:

SIGNATURE

PRINT NAME

DATE