

STANDARD RETAINER AGREEMENT FOR CPA ADVISORY SERVICES

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

CPA Firm: _____

Address: _____

and

Client: _____

Address: _____

1. SCOPE OF SERVICES

The CPA Firm agrees to provide the Client with professional CPA advisory and consulting services, which may include but are not limited to:

- a. Strategic financial planning and business consulting;
- b. Periodic financial review and analysis;
- c. Tax planning, compliance, and consultation;
- d. General accounting advisory services as mutually agreed upon.

Any services outside this scope will require a separate written addendum or engagement letter.

2. TERM & TERMINATION

This Agreement shall commence on _____ and shall continue on a month-to-month basis until terminated. Either party may terminate this Agreement at any time, with or without cause, by providing _____ days written notice to the other party.

3. RETAINER FEES & PAYMENT TERMS

In consideration for the services outlined in Section 1, the Client agrees to pay a recurring retainer fee as follows:

- a. **Retainer Amount:** The Client shall pay a recurring fee of \$ _____ per month.
- b. **Due Date:** The retainer fee is due in advance on the _____ day of each calendar month.
- c. **Hourly Overages:** In the event that advisory hours exceed _____ hours in any given month, additional hours will be billed at the CPA Firm's standard hourly rate of \$ _____ per hour, subject to prior client authorization.
- d. **Expenses:** The Client shall reimburse the CPA Firm for all reasonable out-of-pocket expenses incurred in connection with performing the services, provided such expenses are approved in advance.

4. CLIENT RESPONSIBILITIES

The Client agrees to provide the CPA Firm with all financial records, documents, and information necessary for the performance of services under this Agreement in a timely and accurate manner. The CPA Firm is not responsible for any errors, omissions, or penalties resulting from incomplete or inaccurate information provided by the Client.

5. CONFIDENTIALITY

Both parties agree to keep all proprietary, financial, personal, and business information confidential and to use such information solely for the purpose of executing the services detailed in this Agreement, in compliance with applicable professional standards and regulations.

6. LIMITATION OF LIABILITY

Except for gross negligence or willful misconduct, the CPA Firm's cumulative liability to the Client for any and all claims arising out of or relating to this Agreement shall be limited to the total amount of retainer fees paid by the Client to the CPA Firm under this Agreement during the _____ month period preceding the date the claim arose.

7. GOVERNING LAW

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

8. ENTIRE AGREEMENT

This Agreement constitutes the entire understanding between the parties and supersedes all prior agreements, oral or written, relative to the subject matter hereof.

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

CPA FIRM:

CLIENT:

Authorized Signature

Authorized Signature

Printed Name

Printed Name

Title

Title

Date

Date