

TAX REPRESENTATION AND AUDIT DEFENSE SERVICES AGREEMENT

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

Client Name: _____

Address: _____

Phone Number: _____

Taxpayer ID (SSNEIN): _____

and

Representative/Firm: _____

Address: _____

Professional License No: _____

1. SCOPE OF SERVICES

The Client hereby retains the Representative to provide professional tax representation and audit defense services regarding tax matters before the _____ (e.g., Internal Revenue Service, State Department of Revenue) for the following tax type(s) and specific tax period(s) / year(s):

Tax Type(s): _____

Tax Period(s) / Year(s): _____

2. POWER OF ATTORNEY

The Client agrees to execute and deliver to the Representative all necessary power of attorney forms (including IRS Form 2848 and/or applicable state forms) to authorize the Representative to communicate directly with tax authorities on behalf of the Client regarding the scoped tax matters.

3. PROFESSIONAL FEES AND PAYMENT TERMS

The Client agrees to compensate the Representative for services rendered under the terms of this Agreement as follows:

A. **Retainer:** A non-refundable retainer fee of \$_____ is due upon the execution of this Agreement, to be applied against the final bill or hourly charges.

B. **Fee Structure (Select one):**

☐ **Hourly Rate:** Services will be billed at a rate of \$_____ per hour.

☐ **Flat Fee:** A total flat fee of \$_____ for the complete scope of defense services.

☐ **Other:** _____

C. **Invoicing:** Invoices will be issued monthly and are due upon receipt. Interest of _____% per month will be charged on balances remaining unpaid after _____ days.

4. CLIENT RESPONSIBILITIES

The Client agrees to provide the Representative with all necessary financial records, tax documents, statements, receipts, and correspondence from tax authorities in a timely and complete manner. The Representative is not responsible for penalties, interest, or adverse outcomes resulting from a failure by the Client to provide accurate, truthful, or timely documentation.

5. REPRESENTATIVE RESPONSIBILITY & LIMITATION OF LIABILITY

The Representative will use professional standards of diligence and care to represent the Client's interests. However, the Client acknowledges that the Representative makes no guarantee regarding the outcome of any tax audit, appeal, negotiation, or administrative proceeding.

6. TERMINATION

Either party may terminate this Agreement at any time by providing written notice to the other party. Upon termination, the Client shall pay the Representative for all professional hours expended and expenses incurred up to the date of termination.

7. GOVERNING LAW

This Agreement shall be governed by, and construed in accordance with, the laws of the State of _____.

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

CLIENT SIGNATURE

DATE

REPRESENTATIVE SIGNATURE

DATE