

# TAX PLANNING SERVICES ENGAGEMENT

## RETAINER AGREEMENT

This Tax Consultation and Planning Retainer Agreement (the "Agreement") is entered into and made effective as of \_\_\_\_\_, by and between:

**Tax Consultant:** \_\_\_\_\_, with a principal place of business at \_\_\_\_\_ (hereinafter referred to as the "Consultant"), and

**Client:** \_\_\_\_\_, with a primary address of \_\_\_\_\_ (hereinafter referred to as the "Client").

### 1. SCOPE OF SERVICES

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The Consultant agrees to provide professional tax consultation and planning services to the Client. The specific scope of services includes, but is not limited to:

- a. Analysis of financial records, statements, and transaction histories for tax planning purposes.
- b. Strategic advice regarding tax liabilities, deductions, credits, and compliance under applicable local, state, federal, and international tax laws.
- c. Preparation of tax projections, scenarios, and structured tax planning recommendations.
- d. Ongoing consultations throughout the term of this Agreement as reasonably requested by the Client.

This Agreement does not cover the preparation or filing of tax returns unless specifically agreed to in writing through a separate addendum.

### 2. RETAINER AND COMPENSATION

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In consideration for the services to be performed by the Consultant, the Client agrees to pay compensation as follows:

- a. **Initial Retainer:** The Client shall pay a non-refundable retainer fee of \$ \_\_\_\_\_ upon the execution of this Agreement. This retainer represents an advance payment for services and shall be applied against the hourly rates set forth below.
- b. **Hourly Rates:** Services performed outside of standard retainer coverage or after the initial retainer has been exhausted will be billed at a rate of \$ \_\_\_\_\_ per hour.
- c. **Replenishment:** If the retainer falls below \$ \_\_\_\_\_, the Client agrees to replenish the retainer to its original amount within \_\_\_\_\_ days of written notice from the Consultant.

### 3. CLIENT OBLIGATIONS

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The Client agrees to provide the Consultant with all necessary, accurate, and complete financial information, records, documents, and disclosures required to perform the services. The Consultant shall not be liable for any tax deficiencies, penalties, interest, or other losses resulting from inaccurate, incomplete, or omitted information provided by the Client.

### 4. TERM AND TERMINATION

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This Agreement shall commence on the effective date and shall continue \_\_\_\_\_ unless terminated earlier by either party. Either party may terminate this Agreement at any time by providing \_\_\_\_\_ days written notice to the other party. Upon termination, the Client shall pay for all services rendered up to the date of termination, and any unused portion of the retainer, subject to the terms of Section 2, shall be returned to the Client.

### 5. CONFIDENTIALITY

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The Consultant agrees to maintain the strict confidentiality of all financial, personal, and proprietary information received from the Client. The Consultant shall not disclose any such information to third parties without the prior written consent of the Client, except as required by law or professional ethical standards.

### 6. GOVERNING LAW AND JURISDICTION

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This Agreement shall be governed by, construed, and enforced in accordance with the laws of the State of \_\_\_\_\_, without regard to its conflict of laws principles. Any legal actions arising under this Agreement shall be brought in the courts located in \_\_\_\_\_.

**7. ENTIRE AGREEMENT**

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This Agreement constitutes the entire understanding between the parties regarding the subject matter hereof and supersedes all prior agreements, representations, or understandings, whether written or oral. No amendment to this Agreement shall be valid unless executed in writing by both parties.

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

\_\_\_\_\_  
**CLIENT SIGNATURE**

Name: \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
**CONSULTANT SIGNATURE**

Name: \_\_\_\_\_

Date: \_\_\_\_\_