

AGREEMENT FOR PROFESSIONAL TAX REPRESENTATION AND AUDIT DEFENSE SERVICES

This Agreement for Professional Tax Representation and Audit Defense Services (the "Agreement") is entered into and made effective as of _____, 20____, by and between:

Tax Representative / Firm: _____

Address: _____

Contact Information: _____ (hereinafter referred to as the "Representative"), and

Client: _____

Address: _____

Taxpayer Identification Number(s) (last 4 digits): _____ (hereinafter referred to as the "Client").

1. SCOPE OF REPRESENTATION

The Client hereby retains the Representative to provide professional tax representation and audit defense services exclusively for the following tax authorities, tax types, and tax periods:

A. **Taxing Authority:** _____

B. **Tax Type(s) (e.g., Individual Income, Corporate, Sales, Employment):** _____

C. **Tax Period(s) / Year(s):** _____

Any services requested outside of the specified scopes and periods shall require a separate written agreement or amendment signed by both parties.

2. REPRESENTATIVE'S RESPONSIBILITIES

The Representative agrees to perform the following services on behalf of the Client:

1. Review all relevant tax returns, audits, notices, and correspondence related to the scope of this Agreement.
2. Represent the Client before the designated taxing authority, including participating in conferences, hearings, and meetings.
3. Prepare and submit necessary responses, briefs, documentation, and appeals as appropriate.
4. Keep the Client reasonably informed of the progress of the representation and consult with the Client regarding major decisions.

3. CLIENT'S RESPONSIBILITIES

The Client agrees to fully cooperate with the Representative to ensure effective representation, which includes:

1. Providing complete, accurate, and truthful records, receipts, bank statements, tax returns, and all other requested documentation in a timely manner.
2. Disclosing all facts and circumstances relevant to the audit or representation scope, whether favorable or unfavorable.
3. Timely executing Form 2848 (Power of Attorney and Declaration of Representative) or other relevant authorization forms.
4. Paying all professional fees, costs, and expenses in accordance with Section 4 of this Agreement.

4. FEES, EXPENSES, AND PAYMENT TERMS

The Client agrees to compensate the Representative for services rendered under the following terms:

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

B. **Hourly Rate:** Services will be billed at an hourly rate of \$ _____ per hour.

C. **Flat Fee:** A flat fee of \$ _____ for the complete scope of services specified in Section 1.

D. **Out-of-Pocket Expenses:** The Client shall reimburse the Representative for all reasonable out-of-pocket expenses incurred, including postage, delivery fees, copying fees, travel expenses, and administrative costs.

E. **Payment Schedule:** Invoices are due and payable within _____ days of receipt. Interest at a rate of _____ % per month may be charged on all overdue balances.

5. TERM AND TERMINATION

This Agreement shall commence on the date of execution and shall continue until the completion of the services outlined in Section 1, unless terminated earlier. Either party may terminate this Agreement at any time upon written notice. Upon termination, the Client shall immediately pay the Representative for all services rendered and expenses incurred up to the date of termination.

6. LIMITATION OF LIABILITY AND GUARANTEES

The Client acknowledges that the Representative cannot guarantee a specific outcome, result, or reduction in tax liability, penalties, or interest. The Representative's services are based on professional judgment and interpretation of applicable tax laws as of the date of representation.

7. GOVERNING LAW AND SEVERABILITY

This Agreement shall be governed by, and construed in accordance with, the laws of the State of _____. If any provision of this Agreement is held to be invalid or unenforceable, the remaining provisions shall continue in full force and effect.

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

CLIENT

REPRESENTATIVE

Signature of Client

Signature of Representative / Authorized Agent

Printed Name

Printed Name & Title

Date

Date