

ANNUAL TAX COMPLIANCE SERVICES AGREEMENT

This Annual Tax Compliance Services Agreement (the "Agreement") is entered into as of _____, by and between:

Service Provider: _____

Address: _____

Represented by: _____

and

Client: _____

Address: _____

Represented by: _____

Each of the Service Provider and the Client may be referred to individually as a "Party" and collectively as the "Parties."

1. SCOPE OF SERVICES

The Service Provider agrees to provide the following annual tax compliance services to the Client for the fiscal year ending _____:

1. Preparation and filing of annual federal, state, and local income tax returns.
2. Review of financial statements, ledger entries, and supporting documentation for tax compliance purposes.
3. Calculation of estimated tax payments and preparation of payment vouchers.
4. On-call tax consultation and advisory services limited to _____ hours per month.
5. Representation in routine inquiries or correspondence from tax authorities, excluding formal audits or appeals unless otherwise agreed in writing.

2. CLIENT RESPONSIBILITIES

1. The Client shall provide all necessary financial records, receipts, statements, and information required for the accurate preparation of tax returns no later than _____ days before the respective filing deadlines.
2. The Client represents that all information provided to the Service Provider is accurate, complete, and truthful to the best of their knowledge.

3. FEES AND PAYMENT TERMS

1. **Fixed Annual Fee:** The Client shall pay the Service Provider a flat fee of _____ for the services outlined in Section 1.
2. **Payment Schedule:** The fee shall be payable as follows:
 - Retainer / First Installment: _____ due upon execution of this Agreement.
 - Second Installment: _____ due on _____.
 - Final Balance: _____ due upon completion and prior to electronic submission of tax returns.
3. **Additional Services:** Any services requested outside the scope of Section 1 will be billed at an hourly rate of _____ per hour.

4. TERM AND TERMINATION

1. This Agreement shall commence on the date first written above and shall remain in effect until the completion and filing of the tax returns for the designated fiscal year, unless terminated earlier in accordance with this Section.
2. Either Party may terminate this Agreement upon _____ days written notice to the other Party.

3. In the event of termination, the Service Provider shall be compensated for all services rendered up to the effective date of termination.

5. CONFIDENTIALITY

The Service Provider shall maintain the strictest confidentiality regarding all financial and personal information provided by the Client and shall not disclose such information to any third party without prior written consent, except as required by law.

6. LIMITATION OF LIABILITY

The Service Provider's liability for any errors, omissions, or negligence in connection with the services provided under this Agreement shall be limited to the total fees paid by the Client to the Service Provider under this Agreement.

7. GOVERNING LAW

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

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

For the Service Provider:

Signature

Printed Name

Title

Date

For the Client:

Signature

Printed Name

Title

Date