ESTATE EXECUTOR AND TRUSTEE TAX COMPLIANCE AGREEMENT

TAX COMPLIANCE SERVICES ENGAGEMENT

This Agreement is entered into on this ______ day of ____________, 20___, by and between:

The Representative: ______________________________________, in their capacity as (check applicable):
[ ] Executor / Administrator of the Estate of ______________________________ (Decedent)
[ ] Trustee of the ____ Trust
(hereinafter referred to as the "Fiduciary"),

AND

The Professional: ____ (hereinafter referred to as the "Tax Professional").

1. PURPOSE OF ENGAGEMENT

The Fiduciary retains the Tax Professional to provide federal and state tax compliance, preparation, and advisory services associated with the administration of the aforementioned Estate and/or Trust, in accordance with the terms and conditions set forth herein.

2. SCOPE OF SERVICES

The Tax Professional shall prepare and file the following tax returns and documents (check all that apply):

[ ] Decedent's Final Federal and State Individual Income Tax Returns (Form 1040)
[ ] Federal and State Fiduciary Income Tax Returns (Form 1041 / State equivalent) for the tax year(s): __________________
[ ] Federal and State Estate Tax Returns (Form 706 / State equivalent)
[ ] Federal and State Gift Tax Returns (Form 709)
[ ] Generation-Skipping Transfer Tax Returns
[ ] Information Returns (Forms 1099, K-1, etc.)
[ ] Other: ____

3. FIDUCIARY RESPONSIBILITIES

The Fiduciary agrees to provide the Tax Professional with all necessary, complete, and accurate financial records, inventories, appraisals, bank statements, disbursement records, and any other documentation required for the timely preparation of the tax returns. The Tax Professional is not responsible for auditing or verifying the accuracy of the information provided by the Fiduciary.

4. DEADLINES AND TIMELY SUBMISSION

All requested documentation must be provided to the Tax Professional no later than __________________ prior to the respective filing deadlines. The Tax Professional is not responsible for any late filing penalties or interest incurred due to the Fiduciary's delay in providing requested materials.

5. FEES AND PAYMENT TERMS

The Fiduciary agrees to pay for services rendered under this Agreement as follows:

[ ] Fixed Fee of $__________ for the designated scope.
[ ] Hourly Rate of $__________ per hour.
[ ] Other Rate Structure: ____

Invoices are payable within ______ days of receipt. Retainer required upon execution of this Agreement: $____________.

6. INDEMNIFICATION AND LIMITATION OF LIABILITY

The Fiduciary agrees to indemnify and hold harmless the Tax Professional from any liability, losses, damages, or costs (including legal fees) arising from inaccurate, incomplete, or omitted information provided by the Fiduciary. The Tax Professional's liability under this Agreement shall be limited to the total fees paid by the Fiduciary under this Agreement.

7. GOVERNING LAW

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

8. EXECUTION

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

______________________________	______________________________
Fiduciary Signature	Tax Professional Signature
______________________________	______________________________
Fiduciary Printed Name	Tax Professional Printed Name / Firm
______________________________	______________________________
Date	Date