

RETAINER AGREEMENT

STATE AND FEDERAL TAX AUDIT REPRESENTATION

This Agreement is entered into on this _____ day of _____, 20____, by and between:

Representative:

And Client:

1. SCOPE OF REPRESENTATION

The Client hereby retains the Representative to provide professional tax representation services in connection with State and Federal tax audits. Specifically, the scope of services is limited to the examination of tax returns for the following tax authorities and tax periods:

Federal (IRS) Tax Period(s): _____

State Tax Authority: _____ **Tax Period(s):** _____

Any services beyond the scope of this audit representation, including but not limited to the preparation of tax returns, appeals, or litigation, shall require a separate written agreement.

2. RETAINER AND FEES

The Client agrees to pay a retainer fee of \$ _____ upon execution of this Agreement. This retainer is:

☐ Non-refundable and earned upon receipt.

☐ Refundable, to be applied against hourly fees of \$ _____ per hour.

The Representative will bill the Client periodically, and payments are due within _____ days of the invoice date.

3. CLIENT RESPONSIBILITIES

The Client agrees to cooperate fully with the Representative, to provide all requested financial documents, receipts, statements, and records in a timely manner, and to truthfulness in all communications. The Representative is not responsible for penalties or interest resulting from incomplete, inaccurate, or late information provided by the Client.

4. AUTHORIZATION AND POWER OF ATTORNEY

The Client agrees to execute Federal Form 2848 (Power of Attorney and Declaration of Representative) and/or corresponding State power of attorney forms to authorize the Representative to act on the Client's behalf before the respective taxing authorities.

5. GOVERNING LAW

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

CLIENT

Signature

Printed Name

Date

REPRESENTATIVE

Signature

Printed Name / Title

Date