

STRATEGIC ADVISORY RETAINER & SERVICE AGREEMENT

CERTIFIED PUBLIC ACCOUNTANT (CPA) ADVISORY SERVICES

This Strategic Advisory Retainer and Service Agreement (the "Agreement") is entered into and made effective as of _____ day of _____, 20____, by and between the following parties:

CPA Provider:

Client:

1. ENGAGEMENT AND SCOPE OF SERVICES

The Client hereby engages the CPA Provider, and the CPA Provider agrees to perform strategic financial advisory and consulting services. The scope of services includes, but is not limited to, the following:

- Ongoing financial strategy formulation and business planning support.
- Periodic financial review, analysis, and management reporting.
- Strategic tax planning, structuring, and advisory services.
- Cash flow monitoring, forecasting, and capital allocation advising.
- Other mutual advisory services as agreed upon in writing by both parties.

2. RETAINER AND FEE STRUCTURE

In consideration for the advisory services, the Client agrees to pay the CPA Provider according to the following terms:

- **Monthly Retainer Fee:** The Client shall pay a recurring monthly retainer fee of \$ _____.
- **Payment Terms:** Retainer payments are due in advance on the _____ day of each calendar month, beginning _____, 20____.
- **Hourly Advisory Rate:** For work outside the standard retainer scope, services will be billed at an hourly rate of \$ _____ per hour, subject to prior written approval by the Client.

3. TERM AND TERMINATION

This Agreement shall commence on the effective date and shall continue on a _____ basis. Either party may terminate this Agreement at any time, with or without cause, by providing _____ days written notice to the other party. Upon termination, the Client shall pay for all services rendered up to the effective date of termination.

4. CONFIDENTIALITY AND PROFESSIONAL STANDARDS

The CPA Provider and the Client agree to maintain the strict confidentiality of all business, financial, and proprietary information disclosed during the course of this engagement. All services shall be performed in accordance with applicable professional standards, regulations, and ethical guidelines governing Certified Public Accountants.

5. LIMITATION OF LIABILITY

The CPA Provider's liability for any claim, loss, or damage arising out of this Agreement shall be limited to the total amount of retainer fees paid by the Client to the CPA Provider under this Agreement during the _____ months immediately preceding the event giving rise to the claim.

6. GOVERNING LAW AND JURISDICTION

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

without regard to its conflict of law principles. Any legal action arising hereunder shall be brought in the courts located in _____.

IN WITNESS WHEREOF, the parties hereto have executed this Strategic Advisory Retainer and Service Agreement as of the date first written above.

CPA PROVIDER:

Authorized Signature

Print Name: _____

Title: _____

Date: _____

CLIENT:

Authorized Signature

Print Name: _____

Title: _____

Date: _____