

# RETAINER AGREEMENT FOR TAX ADVISORY AND PLANNING SERVICES

This Retainer Agreement (the "Agreement") is entered into and made effective as of \_\_\_\_\_, by and between:

**Tax Consultant:** \_\_\_\_\_, with a principal place of business at \_\_\_\_\_ (hereinafter referred to as the "Consultant"), and

**Client:** \_\_\_\_\_, with a principal address at \_\_\_\_\_ (hereinafter referred to as the "Client").

## 1. SCOPE OF SERVICES

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The Consultant agrees to provide ongoing tax consultation, advisory, and planning services to the Client, which may include, but are not limited to:

1. Strategic tax planning and structuring advice.
2. Periodic review of financial records for tax compliance.
3. Consultation regarding federal, state, and local tax implications of proposed business transactions.
4. Preparation and submission of standard tax returns, subject to additional terms if specified.
5. Any other tax-related advisory services mutually agreed upon in writing.

## 2. RETAINER AND COMPENSATION

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In consideration for the services to be performed by the Consultant, the Client agrees to pay compensation as follows:

1. **Retainer Fee:** The Client shall pay a recurring retainer fee of \$ \_\_\_\_\_ per \_\_\_\_\_ (e.g., month, quarter). This retainer is due on or before the \_\_\_\_\_ day of each period.
2. **Hourly Rates:** For services exceeding the scope covered by the retainer, or for additional project-based work, the Consultant shall bill at a rate of \$ \_\_\_\_\_ per hour.
3. **Invoicing:** The Consultant will provide detailed invoices for any additional fees, which shall be payable within \_\_\_\_\_ days of receipt.

## 3. TERM AND TERMINATION

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This Agreement shall commence on the effective date and shall remain in effect until \_\_\_\_\_, or until terminated by either party. 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. CLIENT RESPONSIBILITIES AND DISCLOSURE

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The Client agrees to provide the Consultant with all necessary financial records, documents, and disclosures required to perform the tax services. The Consultant is entitled to rely on the accuracy and completeness of the information provided by the Client. The Consultant shall not be held liable for any tax liabilities, penalties, or interest resulting from inaccurate, incomplete, or withheld financial data.

## 5. CONFIDENTIALITY

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The Consultant agrees to maintain the strictest confidentiality regarding all financial and proprietary information provided by the Client. Information will not be disclosed to any third party without the express written consent of the Client, except as required by law or professional standards.

## 6. GOVERNING LAW AND DISPUTE RESOLUTION

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This Agreement shall be governed by and construed in accordance with the laws of the State of \_\_\_\_\_. Any dispute arising out of or in connection with this Agreement shall first be resolved through good-faith negotiation, and if unresolved, shall be submitted to mediation or binding arbitration in \_\_\_\_\_.

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

\_\_\_\_\_  
TAX CONSULTANT SIGNATURE

\_\_\_\_\_  
CLIENT SIGNATURE

\_\_\_\_\_  
PRINTED NAME

\_\_\_\_\_  
PRINTED NAME

\_\_\_\_\_  
DATE

\_\_\_\_\_  
DATE