

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Retainer Based Sales and Use Tax Compliance Services

Dear [Client Contact Name],

This letter confirms the terms and objectives of our engagement to provide sales and use tax compliance services for [Client Company Name] ("Client").

1. Scope of Services

On a recurring monthly basis, [Firm Name] will perform the following services:

- Review of monthly sales and purchase data provided by the Client.
- Preparation of sales and use tax returns for the following jurisdictions: [List Jurisdictions].
- Electronic filing of returns and initiation of tax payments as authorized by the Client.
- Maintenance of a tax calendar to ensure timely filings.
- Basic responses to notices from taxing authorities regarding filed returns.

2. Retainer and Fees

The fee for these services is a fixed monthly retainer of \$[Amount]. This retainer is due on the [Day] of each month. This fee covers the recurring scope defined above. Significant research, audit representation, or voluntary disclosure agreements will be billed separately at our hourly rates or via a separate engagement letter.

3. Client Responsibilities

The Client is responsible for the accuracy and completeness of the data provided. Data must be delivered to our firm no later than the [Day] of each month to ensure timely filing. The Client maintains final responsibility for the payment of all taxes, interest, and penalties imposed by taxing authorities.

4. Term and Termination

This engagement begins on [Start Date] and will continue until terminated by either party. Either party may terminate this agreement with [Number] days' written notice. Any outstanding retainer fees through the date of termination remain due.

5. Limitation of Liability

Our liability for any claim related to this engagement is limited to the total amount of retainer fees paid to [Firm Name] during the [Number] months preceding the claim.

Please sign and return this letter to signify your acceptance of these terms.

Sincerely,

[Your Name/Partner Name]
[Firm Name]

Accepted by:

Signature: _____

Name: [Client Representative Name]

Title: [Client Representative Title]

Date: _____