

[Consultant Name/Firm Name]  
[Address]  
[City, State, Zip Code]

[Date]

[Client Name]  
[Client Title]  
[Company Name]  
[Address]  
[City, State, Zip Code]

## **Re: Engagement for State Tax Credits and Incentives Consulting Services**

Dear [Client Contact Name],

This letter confirms the agreement between [Consultant Name] ("Consultant") and [Company Name] ("Client") for the purpose of identifying, securing, and optimizing state-level tax credits and business incentives.

### **1. Scope of Services**

Consultant will perform the following services:

- Review of Client's business operations and capital investment plans.
- Identification of eligible state tax credits (e.g., R&D, Investment, Job Creation).
- Preparation and filing of necessary applications and compliance documentation.
- Negotiation with state economic development agencies, if applicable.
- Calculation of credit amounts and coordination with Client's tax preparers.

### **2. Client Responsibilities**

Client agrees to provide all financial records, payroll data, and investment documentation necessary to complete the scope of work in a timely manner. Client represents that all information provided is accurate to the best of its knowledge.

### **3. Fees and Payment**

[Option A: Contingency Fee] Consultant shall receive a fee equal to [Percentage]% of the total tax credits or incentives approved or realized by the Client.

[Option B: Fixed Fee] Client agrees to pay a fixed fee of \$[Amount] upon completion of [Milestone].

Invoices are due within [Number] days of receipt.

### **4. Confidentiality**

Both parties agree to maintain the confidentiality of all proprietary information, financial data, and trade secrets shared during the course of this engagement.

**5. Term and Termination**

This agreement begins on [Start Date] and remains in effect until the services are completed. Either party may terminate this agreement with [Number] days written notice.

**6. Limitation of Liability**

Consultant's liability for any claims arising out of this engagement shall be limited to the total amount of fees paid by the Client under this agreement.

Please indicate your acceptance of these terms by signing below.

Sincerely,

[Consultant Signature]  
[Printed Name and Title]

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**Accepted and Agreed:**

For [Company Name]:

Signature: \_\_\_\_\_

Name: [Printed Name]

Title: [Title]

Date: [Date]