

Tax Advisory Services Statement of Work

Date: _____

Prepared for: [Client Name/Company]

Prepared by: [Advisory Firm Name]

Effective Period: [Start Date] to [End Date]

1. Objective

This Statement of Work ("SOW") outlines the scope, timeline, and deliverables for tax advisory services to be provided to [Client Name/Company] by [Advisory Firm Name].

2. Scope of Services

- Review and analysis of current tax positions and compliance status.
- Identification of opportunities for tax efficiencies and savings.
- Preparation of tax planning recommendations and strategies.
- Consultation on federal, state, and local tax compliance requirements.
- Assistance with responding to tax authority queries and audits, as required.

3. Deliverables

1. Initial Tax Review Report
2. Tax Planning Memorandum
3. Quarterly Progress Updates
4. Final Recommendations and Summary Report

4. Timeline

Milestone	Expected Completion
Kickoff & Data Collection	[Date]
Tax Assessment & Review	[Date]
Draft Planning Recommendations	[Date]
Final Report Submission	[Date]

5. Fees & Payment Terms

Professional fees for the above services will be as follows:

- Fixed Fee: \$[Amount]
- Payment Schedule: [e.g., 50% upon commencement, 50% upon completion]
- Additional work beyond this scope will be billed at \$[Hourly Rate]/hour, subject to prior approval.

6. Confidentiality

Both parties agree to maintain confidentiality of all client and proprietary information exchanged during this engagement.

7. Acceptance

By signing below, both parties agree to the terms outlined in this Statement of Work.

For [Client Name/Company]:

Date: _____

For [Advisory Firm Name]:

Date: _____