

Retainer Agreement (Professional)

Consulting & Professional Services

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Get a professional-services retainer agreement for recurring compliance work — scope of recurring services, fees and billing, client responsibilities and data, confidentiality, limitations and reliance, term and termination, and dispute resolution. Align to institute norms and have it reviewed. Fill in your details below.

Purpose of this tool & output

Recurring compliance work on clear terms

How the output is used

Use the draft for a professional retainer for recurring compliance work on clear scope and fee.

Who receives it

The professional/firm and the client — both sign; a copy each.

Fees & charges

No stamp duty for a standard engagement; GST applies on the professional retainer.

Who should vet it

A senior partner, to align with the institute (ICAI/ICSI) standards and scope.

Important cautions

AI-generated template; align to institute norms and have it reviewed.

Companion documents

- CA / CS Firm Setup Guide
- Engagement Letter Builder
- Professional Services Catalogue
- Client Compliance Calendar Service
- Client Data Request Checklist
- Professional Fee Quotation

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.

