

Consulting Service Agreement

Date: [Insert Date]

Consultant: [Consultant Name]

Client: [Client Name]

Introduction

This Consulting Service Agreement ("Agreement") is made and entered into by and between the Consultant and the Client for the purpose of providing financial advisory services.

Services Provided

The Consultant agrees to provide the following services:

- Investment planning
- Retirement planning
- Tax advisory services
- Portfolio management

Payment Terms

Client agrees to pay the Consultant a fee of [Amount] for the services rendered. Payment is due [Specify Payment Terms].

Term of Agreement

This Agreement will commence on [Start Date] and will continue until [End Date], unless terminated earlier by either party with written notice.

Confidentiality

Both parties agree to maintain confidentiality regarding any sensitive information exchanged during the term of this Agreement.

Governing Law

This Agreement shall be governed by and construed in accordance with the laws of [State/Country].

Signatures

[Consultant Name]

[Client Name]