

Client Onboarding Agreement

Date: [Insert Date]

Client Name: [Client's Full Name]

Address: [Client's Address]

Email: [Client's Email]

Phone Number: [Client's Phone Number]

Dear [Client's Name],

Welcome to [Your Company Name]! We are excited to partner with you on your financial journey. This letter outlines our onboarding agreement and expectations for our working relationship.

1. Services Provided

We will provide the following services:

- Financial Planning
- Investment Management
- Tax Planning

2. Fees

The fees for our services will be as follows:

- Initial Consultation: \$[Amount]
- Ongoing Management Fee: [Percentage or Amount]

3. Client Responsibilities

As a client, you agree to provide accurate and complete information relevant to your financial situation in a timely manner.

4. Termination

Either party may terminate this agreement with [Number] days' notice.

5. Acceptance

Please sign below to indicate your acceptance of this agreement:

Client Signature: _____ **Date:** _____

We look forward to working with you!

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Contact Information]