

Asset Management Services Engagement Letter

Date: [Insert Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

We are pleased to confirm our agreement to provide asset management services to you. This letter outlines the terms and conditions of our engagement.

Scope of Services

We will provide the following services:

- Investment strategy development
- Portfolio management
- Performance reporting
- Regular communication and updates

Fees and Expenses

Our fees for these services will be [Insert fee structure]. You will also be responsible for any additional expenses incurred during the engagement.

Duration

This engagement will commence on [Insert start date] and will continue until terminated by either party with [Insert notice period] written notice.

Confidentiality

We will maintain the confidentiality of your information in accordance with applicable laws and regulations.

If you agree to the terms outlined in this letter, please sign and return a copy. We look forward to working with you.

Sincerely,

[Your Name]

[Your Position]

[Your Company Name]

[Your Company Address]

[City, State, Zip Code]

Acceptance

[Client Signature] Date: _____