

Service Agreement

Date: [Insert Date]

Client Name: [Insert Client Name]

Client Address: [Insert Client Address]

Subject: Executive Financial Coaching Service Agreement

Dear [Client Name],

We are pleased to confirm our agreement to provide executive financial coaching services as outlined below:

1. Services Provided

We will provide the following coaching services:

- Personalized financial assessments
- Investment strategy development
- Budgeting and expense management
- Retirement planning

2. Duration

This agreement will commence on [Start Date] and will continue for a period of [Duration] unless terminated by either party with a written notice of [Notice Period].

3. Compensation

The total fee for the services will be [Insert Amount], payable in [Insert Payment Terms].

4. Confidentiality

Both parties agree to maintain the confidentiality of all non-public information exchanged during the duration of this agreement.

5. Acceptance

Please indicate your acceptance of this agreement by signing below:

[Client Name]

[Your Name]

[Your Position]

[Your Company]

We look forward to working with you.

Sincerely,

[Your Name]

[Your Company]

[Contact Information]