Wealth Management Partnership Agreement

Date: [Insert Date]

Parties:

[Partner 1 Name] (hereinafter referred to as "Partner 1")

[Partner 2 Name] (hereinafter referred to as "Partner 2")

1. Purpose

The purpose of this agreement is to outline the collaborative efforts of Partner 1 and Partner 2 in the management and growth of wealth for their clients.

2. Responsibilities

Both parties agree to share the responsibilities as follows:

- Partner 1 will handle investment strategy and portfolio management.
- Partner 2 will focus on client relationship management and communication.

3. Profit Sharing

Any profits generated through this partnership shall be divided as follows:

- Partner 1: [Insert Percentage]
- Partner 2: [Insert Percentage]

4. Duration

This agreement will commence on [Insert Start Date] and will last until [Insert End Date], unless terminated earlier by mutual agreement.

5. Termination

Either party may terminate this agreement with [Insert Notice Period] notice, provided that all joint projects are completed.

6. Confidentiality

Both parties agree to maintain confidentiality regarding proprietary information obtained during the partnership.

7. Signatures

By signing below, both parties agree to the terms outlined in this Wealth Management Partnership Agreement.

____
[Partner 1 Name]
Date: __________

____
[Partner 2 Name]
Date: __________