

Fiduciary Investment Advisory Arrangement

Date: [Insert Date]

Client Name: [Insert Client Name]

Client Address: [Insert Client Address]

Dear [Client Name],

We are pleased to confirm our fiduciary investment advisory arrangement. This letter outlines the terms and conditions, including our roles and responsibilities as your investment advisors.

1. Scope of Services

We will provide the following services:

- Investment management and advisory services
- Portfolio analysis and asset allocation
- Regular performance reporting

2. Fees

Our fee structure is based on a percentage of assets under management, which is outlined as follows:

[Insert Fee Structure]

3. Fiduciary Duty

As your fiduciary advisor, we are committed to acting in your best interest and will prioritize your goals and objectives in all investment decisions.

4. Termination

This arrangement may be terminated by either party with [Insert Notice Period] written notice.

We appreciate the opportunity to work with you and look forward to helping you achieve your investment goals. Please sign and return a copy of this letter to indicate your acceptance of the terms outlined above.

Sincerely,

[Your Name]
[Your Title]
[Your Company Name]
[Your Contact Information]

Accepted by:

[Client Name]
Date: _____