

Financial Advisory Service Agreement

Date: [Insert Date]

Client Name: [Insert Client Name]

Client Address: [Insert Client Address]

Dear [Client Name],

We are pleased to confirm our engagement as your financial advisors. This letter outlines the terms and scope of our services.

Scope of Services

Our services will include, but are not limited to:

- Comprehensive financial planning
- Investment strategy development
- Retirement planning
- Tax planning
- Regular financial reviews

Fees

Our fees will be based on [insert fee structure, e.g., hourly rate, flat fee, percentage of assets under management]. We will provide an invoice on a [monthly/quarterly/annual] basis.

Terms and Conditions

This agreement may be terminated by either party with [insert notice period] notice.

We appreciate the opportunity to work with you and look forward to a successful advisory relationship.

Best regards,

[Your Name]

[Your Title]

[Company Name]

[Company Address]

[Contact Information]