

# Investment Advisory Engagement Contract

**Date:** [Insert Date]

**Client Name:** [Insert Client Name]

**Client Address:** [Insert Client Address]

Dear [Client Name],

We are pleased to confirm our agreement to provide investment advisory services to you. This letter serves as the engagement contract between [Your Company Name] ("Advisor") and you ("Client"). The terms of our engagement are as follows:

## 1. Services Provided

The Advisor will provide the following services: [List services, e.g., portfolio management, risk assessment, investment strategy guidance, etc.].

## 2. Fees

The fee for our services will be [Insert fee structure, e.g., flat fee, percentage of assets under management, etc.].

## 3. Duration

This engagement shall commence on [Insert start date] and shall continue until terminated in writing by either party.

## 4. Confidentiality

Both parties agree to maintain the confidentiality of all information exchanged during this engagement.

## 5. Acceptance

If you agree to the terms outlined above, please sign and return a copy of this letter.

Thank you for choosing [Your Company Name]. We look forward to working with you.

Sincerely,

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

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[Client Name]

Date: \_\_\_\_\_