

Investment Advisory Relationship Agreement

Date: [Insert Date]

[Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

We are pleased to confirm our agreement to serve as your investment advisor. This letter outlines the terms of our relationship.

1. Scope of Services

Our services will include investment planning, portfolio management, and ongoing investment advice tailored to your financial goals.

2. Fees

Our fees for services will be [insert fee structure].

3. Responsibilities

You agree to provide us with complete and accurate information regarding your financial situation.

4. Term and Termination

This agreement will remain in effect until terminated by either party with [insert notice period].

5. Acknowledgment and Acceptance

If you agree to the terms outlined above, please sign below.

Signature: _____

Date: _____

We look forward to working with you to achieve your investment goals.

Sincerely,

[Your Name]

[Your Title]

[Company Name]

[Company Address]

[City, State, Zip Code]