

# Investment Management Service Agreement

Date: [Insert Date]

Client Name: [Insert Client Name]

Client Address: [Insert Client Address]

Dear [Client Name],

We are pleased to offer you our Investment Management Services. This agreement outlines the terms and conditions under which we will manage your investment portfolio.

## 1. Services Provided

We will manage your investment portfolio, including but not limited to:

- Asset Allocation
- Investment Strategy Development
- Performance Monitoring

## 2. Fees

The fee for our services will be [Insert Fee Structure].

## 3. Term of Agreement

This agreement will commence on [Start Date] and will continue until terminated by either party with a written notice of [Insert Notice Period].

## 4. Client Responsibilities

The client agrees to provide all necessary information and documentation to facilitate the management of the investment portfolio.

## 5. Governing Law

This agreement shall be governed by the laws of [Insert Governing Law State].

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

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[Client Name]  
Date: \_\_\_\_\_

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[Your Company Name]  
Date: \_\_\_\_\_

Please feel free to contact us at [Insert Contact Information] if you have any questions.

Sincerely,

[Your Name]  
[Your Position]  
[Your Company Name]  
[Your Contact Information]