

# Personalized Investment Strategy Agreement

Date: [Insert Date]

Client Name: [Insert Client Name]

Client Address: [Insert Client Address]

Dear [Client Name],

We are pleased to present you with your Personalized Investment Strategy Agreement. This document outlines the bespoke investment strategy tailored to your financial goals, risk tolerance, and investment preferences.

## Investment Objectives

[Insert a brief description of the client's investment objectives]

## Investment Strategy

[Detailed description of the proposed investment strategy]

## Risk Assessment

[Overview of the client's risk profile]

## Fees and Charges

[Outline any fees associated with the investment strategy]

## Review and Adjustments

[Details on how and when the investment strategy will be reviewed]

By signing below, you acknowledge your understanding and acceptance of the terms outlined in this agreement.

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Client Signature

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Advisor Signature

Thank you for entrusting us with your investment strategy. We look forward to working together to achieve your financial goals.

Sincerely,

[Your Name]

[Your Title]

[Your Company]