

Wealth Management Advisory 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 you with wealth management advisory services. Below are the terms of our contract:

1. Services Provided

We will provide comprehensive wealth management advisory services, which include but are not limited to investment management, financial planning, and tax optimization strategies.

2. Fees

The fees for our services will be [Insert Fee Structure]. Payment will be due [Insert Payment Terms].

3. Term

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

4. Confidentiality

Both parties agree to maintain confidentiality regarding all sensitive information shared during the course of this advisory relationship.

5. Governing Law

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

Please sign below to indicate your acceptance of the terms outlined above.

Client Signature: _____ Date: _____

Advisor Signature: _____ Date: _____

Thank you for choosing us as your wealth management advisors. We look forward to working with you.

Sincerely,

[Your Name]

[Your Company]

[Your Contact Information]