

# Investment Advisory Engagement Confirmation

Date: [Insert Date]

[Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

We are pleased to confirm your engagement of [Your Company Name] as your investment advisor. This letter outlines the terms and conditions of our advisory relationship.

## Scope of Services

We will provide the following services:

- Investment strategy development
- Portfolio management
- Performance monitoring and reporting

## Fees

Our fees for the services will be as follows:

- Annual fee: [Fee Structure]
- Payment terms: [Payment Details]

## Term of Engagement

This engagement will begin on [Start Date] and will continue until terminated by either party with written notice.

Please indicate your acceptance of this engagement by signing below and returning a copy to us.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Contact Information]

## **Acceptance**

Client Signature: \_\_\_\_\_

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