

Investment Advisory Partnership Acknowledgment

Date: [Insert Date]

To,

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

We are pleased to acknowledge the establishment of our investment advisory partnership. This letter serves to confirm our mutual understanding regarding our roles, responsibilities, and objectives in managing your investment portfolio.

As your investment advisor, our primary objective is to:

- Assess your financial goals and risk tolerance.
- Provide tailored investment recommendations.
- Regularly review and adjust your investment strategy as needed.

It is essential for us to maintain open communication to ensure that your investment strategy aligns with your financial objectives. We are honored to have the opportunity to work together and help you achieve your financial goals.

Please sign and return the enclosed copy of this letter to confirm your acknowledgment of our partnership.

Thank you for choosing us as your trusted investment advisor.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Contact Information]