

Investment Advisory Services Confirmation

Date: [Insert Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

We are pleased to confirm our agreement to provide you with investment advisory services as discussed. This letter outlines the key aspects of our engagement.

Scope of Services

We will provide the following services:

- Investment planning and strategy development
- Portfolio management
- Regular performance reporting and review
- Market research and insights

Fees

The fee for our services will be [Insert Fee Structure]. This will be billed [monthly/quarterly/annually].

Duration

This agreement will commence on [Start Date] and will remain in effect until terminated by either party with written notice.

Thank you for choosing [Your Company Name]. We look forward to working with you and helping you achieve your investment goals.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Contact Information]