

# Investment Advisory Fee Agreement

**Date:** [Insert Date]

**Nonprofit Organization Name:** [Insert Organization Name]

**Address:** [Insert Organization Address]

Dear [Insert Recipient's Name],

We are pleased to present this Investment Advisory Fee Agreement (the "Agreement"), which outlines the terms and conditions under which [Investment Advisor Name] (the "Advisor") will provide investment advisory services to [Nonprofit Organization Name] (the "Client").

## 1. Services

The Advisor agrees to provide investment advisory services including, but not limited to, portfolio management, investment strategy formulation, and performance analysis tailored to the Client's objectives.

## 2. Fees

The Client agrees to pay the Advisor an investment advisory fee of [Insert Fee Structure] based on the assets under management. Fees will be calculated and invoiced on a [monthly/quarterly/annual] basis.

## 3. Term

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

## 4. Confidentiality

Both parties agree to maintain confidentiality regarding all information shared under this Agreement.

## 5. Governing Law

This Agreement shall be governed by the laws of [Insert State/Country].

Please indicate your acceptance of this Agreement by signing below.

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[Nonprofit Organization Name]

By: \_\_\_\_\_

Name: [Insert Name]

Title: [Insert Title]

Date: [Insert Date]

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[Investment Advisor Name]

By: \_\_\_\_\_

Name: [Insert Name]

Title: [Insert Title]

Date: [Insert Date]

Thank you for the opportunity to serve [Nonprofit Organization Name]. We look forward to a successful partnership.

Sincerely,

[Your Name]

[Your Title]

[Investment Advisor Name]