

Multi-Asset Investment Advisory Agreement

Date: [Insert Date]

Client Name: [Insert Client Name]

Client Address: [Insert Client Address]

Dear [Client Name],

We are pleased to offer you our Multi-Asset Investment Advisory services based on our discussions. This letter outlines the terms of our agreement.

1. Services Provided

We will provide investment advisory services concerning the management of your multi-asset portfolio, which includes equities, fixed income, real assets, and alternative investments.

2. Fees

Our fee for the advisory services will be [Insert Fee Structure] and will be payable [Insert Payment Terms].

3. Term and Termination

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

4. Confidentiality

Both parties agree to keep all information related to this agreement confidential.

5. Acceptance

If you agree with the terms outlined in this letter, please sign below to indicate your acceptance and return a signed copy to us.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Client Name] (Signature)

Date: _____