

Financial Consultancy Engagement Offer

Date: [Insert Date]

[Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

We are pleased to extend our offer for financial consultancy services to assist you in achieving your financial goals. This engagement will encompass the following services:

- Financial analysis and planning
- Investment strategy development
- Tax planning and optimization
- Retirement planning

The terms of our engagement will be as follows:

Engagement Fee: [Insert Fee Structure]

Duration: [Insert Duration]

Payment Terms: [Insert Payment Terms]

We believe our expertise will provide valuable insights and guide you towards financial success. Please sign and return a copy of this letter to confirm your acceptance of this engagement.

Thank you for considering our services. We look forward to working with you.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Contact Information]

Accepted By,

[Client's Name]

[Client's Signature] _____ Date: _____