

Investment Advisory Service Engagement Letter

Date: [Insert Date]

[Client Name]
[Client Address]
[City, State, ZIP]

Dear [Client Name],

We are pleased to confirm our engagement to provide investment advisory services to you. This letter outlines the scope of our services, the responsibilities of both parties, and other important information regarding our relationship.

Scope of Services

We will provide the following investment advisory services:

- Investment strategy development
- Portfolio management
- Performance reporting
- Regular consultations

Client Responsibilities

You agree to provide us with accurate and complete information regarding your financial situation, investment objectives, and risk tolerance.

Fees and Payment

Our fees for the services will be [insert fee structure]. Payment is due [insert payment terms].

Term and Termination

This engagement will commence on [insert start date] and will continue until terminated by either party with [insert notice period] written notice.

We appreciate the opportunity to work with you and look forward to helping you achieve your financial goals. If you agree with the terms outlined above, please sign and return a copy of this letter.

Sincerely,
[Your Name]
[Your Title]
[Your Company Name]
[Your Contact Information]

Agreed and Accepted by:

[Client Name]
[Date]