

# Family Financial Advisory Engagement Letter

Date: [Insert Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

We are pleased to confirm our engagement as your financial advisors. Our primary goal is to assist you in achieving your family's financial objectives, and to provide comprehensive guidance tailored to your needs.

## Scope of Services

We will provide the following services:

- Financial planning and analysis
- Investment advice and portfolio management
- Retirement planning
- Tax strategy and planning
- Estate planning

## Fees

Our fees for these services will be as follows:

- Initial Consultation Fee: [Amount]
- Ongoing Advisory Fee: [Amount or Percentage]

## Confidentiality

We take your privacy seriously. All information provided will be kept confidential in accordance with applicable laws.

## Acceptance

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

We look forward to working with you and assisting your family in achieving your financial goals.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]

## **Agreement**

Accepted by:

\_\_\_\_\_

[Client Name]

Date: \_\_\_\_\_