

Engagement Letter for Financial Planning Services

Date: [Insert Date]

[Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

We are pleased to confirm our engagement to provide financial planning services for you. This letter outlines the scope of our services and the terms of our engagement.

Scope of Services

Our financial planning services will include:

- Assessment of your current financial situation
- Development of a personalized financial plan
- Investment strategy recommendations
- Ongoing support and review

Fees

Our fees for these services will be [insert fee structure]. Payment is due upon receipt of the invoice.

Confidentiality

All information you provide will be kept confidential and will not be disclosed to third parties without your consent, except as required by law.

Acceptance

If you agree with the above terms, please sign below to confirm your acceptance of this engagement.

Sincerely,
[Your Name]

[Your Title]
[Your Company]

Client Signature: _____

Date: _____