

# Client Retainer Agreement

**Date:** [Insert Date]

**Client Name:** [Insert Client Name]

**Client Address:** [Insert Client Address]

Dear [Client Name],

This letter serves as a formal retainer agreement ("Agreement") between [Your Company Name] ("Advisor") and [Client Name] ("Client") for financial advisory services.

## 1. Services Provided

The Advisor shall provide the following services:

- [Service 1]
- [Service 2]
- [Service 3]

## 2. Retainer Fee

The Client agrees to pay the Advisor a retainer fee of [Insert Fee Amount] due on [Insert Due Date].

## 3. Term of Agreement

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

## 4. Confidentiality

Both parties agree to keep all information exchanged confidential and will not disclose it to any third party without written consent.

## 5. Acceptance

By signing below, both parties agree to the terms of this retainer agreement.

**Advisor:**

[Your Name]  
[Your Signature]  
[Your Position]

**Client:**

[Client Name]  
[Client Signature]

Thank you for choosing [Your Company Name] as your financial advisor. We look forward to working with you.

Sincerely,

[Your Company Name]  
[Your Contact Information]