

Investment Advisory Services Agreement

[Your Company Name]

[Your Company Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

We are pleased to introduce you to our investment advisory services. At [Your Company Name], our goal is to manage your investment portfolio with the utmost care and expertise, ensuring we align with your financial objectives.

Scope of Services

- Personalized investment planning
- Portfolio management and monitoring
- Regular performance reviews and updates
- Access to market research and insights

Fee Structure

Our fees are structured as follows:

- [Description of Fees - e.g., flat fee, percentage of assets, etc.]

Next Steps

To proceed, please sign and return the attached agreement. We look forward to partnering with you on your investment journey.

Best regards,

[Your Name]

[Your Position]

[Your Company Name]