

Investment Advisory Services Agreement

Date: [Insert Date]

Client Name: [Insert Client's Name]

Client Address: [Insert Client's Address]

Dear [Client's Name],

We are pleased to present you with this letter outlining our investment advisory services for your portfolio management. Our focus is to assist you in achieving your financial goals through a well-structured investment strategy.

Scope of Services

- Assessment of your current financial situation and goals.
- Development of a tailored investment strategy.
- Ongoing portfolio management and monitoring.
- Regular performance reports and reviews.

Fees

Our fees for investment advisory services are as follows:

- Initial Consultation Fee: [Insert Fee]
- Annual Management Fee: [Insert Fee] of assets under management.

Terms and Conditions

Please review the attached terms and conditions for our investment advisory services. Your agreement to these terms is necessary to proceed.

If you have any questions or require further clarification, please do not hesitate to contact us. We look forward to assisting you in managing your investments effectively.

Best regards,

[Your Name]

[Your Position]

[Company Name]

[Contact Information]