

Investment Advisory Services Agreement

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 investment advisory services as part of your wealth management strategy. Our primary goal is to assist you in achieving your financial objectives through a tailored investment approach.

Scope of Services

The services we will provide include, but are not limited to:

- Comprehensive portfolio analysis
- Asset allocation recommendations
- Investment selection and monitoring
- Regular performance reporting
- Ongoing financial planning advice

Fees

Our fees for this service will be based on a percentage of assets under management, detailed as follows:

- [Insert Fee Structure]

Terms and Conditions

This agreement will remain in effect until terminated by either party with written notice. Please review the attached terms and conditions for additional details.

If you agree with the terms of this letter, please sign and return a copy at your earliest convenience.

We look forward to working with you and being a part of your wealth management journey.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Contact Information]

Enclosures: Terms and Conditions