

Fiduciary Advisory Services Agreement

Date: _____

Client Name: _____

Client Address: _____

Dear [Client Name],

This Fiduciary Advisory Services Agreement ("Agreement") is made and entered into as of the date above by and between [Your Company Name], located at [Your Company Address] ("Advisor"), and [Client Name] ("Client").

1. Services Provided

The Advisor agrees to provide fiduciary investment advisory services which may include, but are not limited to:

- Investment planning
- Portfolio management
- Risk assessment

2. Compensation

The Client agrees to pay the Advisor a fee as detailed in the attached Schedule A.

3. Duration of Agreement

This Agreement shall commence on the date first written above and continue until terminated by either party with written notice of thirty (30) days.

4. Confidentiality

Both parties agree to keep all confidential information shared during the term of this Agreement secure and not disclose it to any third party without prior written consent.

IN WITNESS WHEREOF, the parties hereto have executed this Fiduciary Advisory Services Agreement as of the date first above written.

[Your Company Name] - Advisor

[Client Name] - Client