

Financial Advisory Service Agreement

Date: **[Insert Date]**

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

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

Dear [Client Name],

We are pleased to confirm our agreement to provide financial advisory services to you. This agreement outlines the terms of our collaboration:

1. Services Provided

We will provide comprehensive financial advisory services including, but not limited to:

- Investment planning
- Tax planning
- Retirement planning
- Estate planning

2. Fees

The fee for our services will be **[Specify Fee Structure]**, payable **[Insert Payment Terms]**.

3. Duration

This agreement will commence on **[Insert Start Date]** and will continue until **[Insert End Date]** or until terminated by either party with **[Insert Notice Period]** written notice.

4. Confidentiality

Both parties agree to maintain confidentiality regarding all sensitive information exchanged during the course of this agreement.

5. Governing Law

This agreement shall be governed by the laws of **[Insert Governing State/Country]**.

We look forward to working with you to achieve your financial goals. Please sign and return a copy of this agreement to indicate your acceptance.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]

Agreed and Accepted by:

[Client Name]

Date: _____