Financial Advisory Terms and Conditions

Date: [Insert Date]

Client Name: [Insert Client Name]

Client Address: [Insert Client Address]

Dear [Client Name],

We are pleased to provide you with our financial advisory services. Below are the terms and conditions that govern our relationship:

1. Services Provided

We will provide financial planning, investment advice, and portfolio management services tailored to your objectives and risk tolerance.

2. Fees

Our fees will be calculated as a percentage of assets under management, as outlined in the attached fee schedule.

3. Client Responsibilities

Clients are expected to provide accurate and complete information regarding their financial situation.

4. Confidentiality

All client information will be treated with strict confidentiality and will not be shared without consent.

5. Termination

Either party may terminate this agreement with a written notice of 30 days.

6. Governing Law

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

Acceptance

Your signature below indicates acceptance of these terms and conditions:

______________________________ Client Signature

Date: **________________________**

Thank you for choosing us as your financial advisor. We look forward to working with you.

Best Regards,

[Your Name]
[Your Title]
[Your Company Name]
[Contact Information]