

Financial Consulting Arrangement

Date: [Insert Date]

[Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

We are pleased to confirm our arrangement to provide financial consulting services to you. Below are the terms of our agreement:

Scope of Services

We will provide the following services:

- Financial analysis and planning
- Investment strategy development
- Tax planning and advice

Fees

The fee for our services will be [insert fee structure], payable [insert payment terms].

Duration

This agreement will commence on [start date] and continue until [end date], unless terminated earlier by either party.

Confidentiality

We will maintain the confidentiality of all information shared with us during the consulting process.

We look forward to working with you to achieve your financial goals. Please sign below to acknowledge your acceptance of this arrangement.

Sincerely,

[Your Name]

[Your Title]

[Your Company]
[Your Contact Information]

[Client's Name]

Date: _____