

Retainer Agreement

Date: [Insert Date]

[Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

We are pleased to confirm our agreement regarding the financial advisory services to be provided to you by [Advisory Firm's Name]. This letter outlines the terms and conditions of our retainer arrangement.

Scope of Services

We will provide financial advisory services which include but are not limited to:

- Investment planning
- Retirement planning
- Tax strategy consultation
- Estate planning

Retainer Fee

The retainer fee for our services will be [Insert Fee Amount] per [month/quarter/year], payable in advance.

Term

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

Confidentiality

We agree to maintain the confidentiality of your information in accordance with applicable laws and regulations.

By signing below, you acknowledge and accept the terms outlined in this retainer agreement.

Sincerely,

[Your Name]

[Your Title]

[Advisory Firm's Name]

Client's Signature: _____

Date: _____