

Financial Advisory Consulting Engagement Letter

Date: _____

To: [Client Name]

[Client Address Line 1]

[Client Address Line 2]

From: [Consultant Firm Name]

[Consultant Address Line 1]

[Consultant Address Line 2]

Re: Financial Advisory Consulting Engagement

Dear [Client Name],

This letter (the "Agreement") confirms the terms and conditions under which [Consultant Firm Name] ("Consultant") will provide financial advisory consulting services to [Client Name] ("Client").

1. Scope of Services

Consultant will provide the following services:

- Assessment of Client's financial situation
- Development of customised financial strategies
- Assistance with implementation of agreed solutions
- Other advisory services as mutually agreed in writing

2. Fees and Payment

The Client agrees to pay Consultant as follows:

- Fee structure: [Describe hourly, fixed, or retainer fees]
- Payment schedule: [e.g., monthly, upon invoice, etc.]
- Additional expenses, if any, will be pre-approved and invoiced accordingly

3. Term and Termination

The term of this engagement commences on [Start Date] and continues until terminated by either party upon [Number] days' written notice.

4. Confidentiality

Consultant agrees to keep confidential all information obtained from the Client in connection with this engagement, except as required by law.

5. Limitation of Liability

Consultant's liability under this Agreement is limited to the amount of fees paid by the Client for the services rendered.

6. Acceptance

Please confirm your agreement to the above terms by signing and returning a copy of this letter.

[Consultant Name]
[Consultant Title]
[Consultant Firm Name]

[Client Name]
[Client Title]
[Client Company]

Date