

# 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.

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[Consultant Name]

[Consultant Title]

[Consultant Firm Name]

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[Client Name]

[Client Title]

[Client Company]

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Date