

Financial Advisory Services Statement of Work

1. Project Overview

[Insert brief description of the project and its objectives]

2. Scope of Services

- *[Service 1 Description]*
- *[Service 2 Description]*
- *[Service 3 Description]*

3. Deliverables

- *[Deliverable 1]*
- *[Deliverable 2]*
- *[Deliverable 3]*

4. Timeline & Milestones

Milestone	Description	Date
<i>[Milestone 1]</i>	<i>[Description]</i>	<i>[Date]</i>
<i>[Milestone 2]</i>	<i>[Description]</i>	<i>[Date]</i>

5. Fees & Payment Terms

Description	Amount	Payment Due
<i>[Fee Component 1]</i>	<i>[Amount]</i>	<i>[Due Date]</i>
<i>[Fee Component 2]</i>	<i>[Amount]</i>	<i>[Due Date]</i>

6. Key Contacts

Name	Role	Contact Information
<i>[Advisor Name]</i>	<i>[Role]</i>	<i>[Email / Phone]</i>
<i>[Client Name]</i>	<i>[Role]</i>	<i>[Email / Phone]</i>

7. Terms & Conditions

[Insert relevant terms, confidentiality clauses, termination conditions, etc.]

8. Acceptance & Signatures

Name	Signature	Date
[Advisor Name]		
[Client Name]		