

Financial Advisory Firm

Professional Financial Services

LETTER OF ENGAGEMENT

Date: 8/19/2025

To: REKHA SAXENA

Email: udditkantsinha@gmail.com

Dear REKHA,

Welcome to our firm! We are delighted to have you as a client and look forward to providing you with comprehensive financial advisory services.

This Letter of Engagement (LOE) outlines the terms and conditions of our professional relationship, including the services we will provide, our fee structure, and your responsibilities as a client.

Services to be Provided:

- Comprehensive Financial Planning and Analysis
- Investment Advisory and Portfolio Management
- Risk Assessment and Management Strategies
- Retirement Planning and Wealth Preservation
- Tax-Efficient Investment Strategies
- Regular Portfolio Reviews and Rebalancing

Fee Structure:

- Initial Financial Planning Fee: \$5,000
- Ongoing Advisory Fee: 1% of assets under management
- Reduced fee of 0.75% for assets above \$1,000,000
- Quarterly billing in advance

Additional Notes:

Test LOE from API

Client Signature:

[Client Signature Image]