

Client Service Agreement

Parties Involved:

Client: Jane Smith

Financial Institution: Global Finance Solutions

Effective Date: January 1, 2023

Agreement Overview:

This agreement outlines the terms and conditions under which Global Finance Solutions agrees to provide financial advisory and management services to Jane Smith.

Services Provided:

1. Financial Planning: Assistance in determining financial objectives, identifying financial resources, and setting financial priorities.
2. Investment Management: Guidance on portfolio construction, asset allocation, and investment strategy based on the client's risk tolerance and financial goals.
3. Tax Planning: Strategies to minimize tax liabilities through tax-efficient investing and estate planning.
4. Retirement Planning: Recommendations on retirement savings, investment strategies, and income generation during retirement.
5. Estate Planning: Assistance in planning the distribution of assets in the event of death.

Client Responsibilities:

1. Information Sharing: The client agrees to provide accurate and complete financial information to aid in the advisory process.

2. Notification: The client will inform the financial institution of any significant changes in financial status or personal circumstances.

3. Fees: The client agrees to pay any fees associated with the services provided, as outlined in the fee schedule.

Confidentiality:

Both parties agree to maintain the confidentiality of all information shared during the advisory process, unless disclosure is required by law.

Termination:

Either party may terminate this agreement with 30 days written notice. Any fees incurred up to the termination date will be due and payable.

Dispute Resolution:

Any disputes arising from this agreement will be resolved through mediation, followed by binding arbitration if necessary.

Governing Law:

This agreement is governed by the laws of the state in which the client resides.

Acknowledgement:

Both parties acknowledge that they have read, understood, and agreed to the terms and conditions outlined in this agreement.

Signatures:

Jane Smith _____ Date: _____

Global Finance Solutions Representative _____ Date: _____