

Sample Financial Consulting Agreement

Date

Name
Company
Address
City/State/Zip

Dear

This letter shall serve as a letter of agreement between _____ (CLIENT) and _____ (CONSULTANT) governing the provision of professional financial consulting services for CLIENT by CONSULTANT.

CONSULTANT, shall provide such consulting services as determined appropriate and as specifically requested by CLIENT.

CLIENT agrees to compensate CONSULTANT on an advance base retainer arrangement. Under the term of such an arrangement CLIENT will provide CONSULTANT with a check in the amount of _____ (\$XXX) per month on or before the first day of each month (except for the first month, _____ when payment shall be due on or before the tenth day of the month). In exchange for this compensation, CONSULTANT shall provide up to six (6) hours per month consultation. Additional time expended by CONSULTANT shall be invoiced at the rate of _____ (\$XXX) per hour and Client shall provide payment to CONSULTANT within ten (10) days of the date of such invoices.

CLIENT agrees to reimburse CONSULTANT for direct expenses specifically incurred as a result of providing such services to CLIENT, to include travel and communications within ten (10) days of the date of an invoice for such expenditures. Travel expenses, if any, shall be invoiced as follows:

Mr. Travel: Standard Coach Rates

Per Diem: \$XXX per day or \$XX plus the cost of hotel lodging, whichever is greater, for any travel in excess of 50 miles from _____. Partial day per diem (where no hotel room is required) at \$XX.

Ground Travel: Personal car mileage at \$0. XX/mile and rental cars and public conveyance at actual charges incurred.

CLIENT may terminate this agreement upon thirty (30) days written notice and the agreement shall otherwise be terminated on _____.

If the terms of this agreement meet, with your approval, please indicate same below by your signature and return a copy for my files.

Sincerely,

Accepted for _____

Date _____