

FINANCIAL PLANNING AND ANALYSIS SERVICES AGREEMENT

This Financial Planning and Analysis Services Agreement (the "Agreement") is entered into as of _____ (the "Effective Date"), by and between:

Provider: _____, with a principal place of business at _____ ("Provider").

Client: _____, with a principal place of business at _____ ("Client").

1. SCOPE OF SERVICES

Provider shall perform financial planning and analysis (FP&A) services for the Client as described herein. The specific deliverables, schedules, and scope of work shall include:

- a. Financial modeling, forecasting, and budgeting analysis.
- b. Variance analysis, performance reporting, and strategic decision support.
- c. Any additional financial advisory and analysis services mutually agreed upon in writing by both Parties.

2. COMPENSATION AND PAYMENT TERMS

In consideration for the services provided, Client agrees to pay Provider as follows:

- **Service Fee:** _____ per _____.
- **Invoicing:** Provider shall invoice Client on a _____ basis.
- **Payment Terms:** All invoices are due and payable within _____ days from the invoice date. Late payments shall accrue interest at a rate of _____ % per month.

3. TERM AND TERMINATION

This Agreement shall commence on the Effective Date and shall continue until _____, unless terminated earlier as provided herein.

Either Party may terminate this Agreement at any time, with or without cause, by providing _____ days' written notice to the other Party. Upon termination, Client shall pay Provider for all services rendered up to the effective date of termination.

4. CONFIDENTIALITY AND DATA SECURITY

Provider acknowledges that in the course of performing services, Provider will have access to non-public, proprietary, and highly sensitive financial information of the Client. Provider agrees to maintain the absolute confidentiality of all such information and shall not disclose, disseminate, or use any Client information for any purpose other than the performance of services under this Agreement, except as required by law.

5. INDEPENDENT CONTRACTOR STATUS

The relationship of the Provider to the Client is that of an independent contractor. Nothing in this Agreement shall be construed to create a partnership, joint venture, agency, or employer-employee relationship between the Parties.

6. INTELLECTUAL PROPERTY

All financial models, templates, and methodologies developed by Provider prior to or independently of this Agreement remain the sole property of Provider. All specific reports, custom dashboards, and deliverables generated specifically for the Client under this Agreement shall become the property of the Client upon full payment of all outstanding fees.

7. LIMITATION OF LIABILITY

The financial analyses, forecasts, and advice provided by Provider under this Agreement are based on information provided by the Client. Provider does not guarantee any specific financial outcome, business result, or performance metric. In no event shall Provider be liable to Client for any consequential, indirect, incidental, or special damages, and Provider's total liability under this Agreement shall not exceed the total fees paid by Client to Provider during the _____ months immediately preceding the event giving rise to liability.

8. GOVERNING LAW AND DISPUTE RESOLUTION

This Agreement shall be governed by and construed in accordance with the laws of the State of _____, without giving effect to conflict of law principles. Any dispute arising under or relating to this Agreement shall be resolved through binding arbitration in _____.

9. ENTIRE AGREEMENT

This Agreement constitutes the entire understanding between the Parties regarding the subject matter hereof and supersedes all prior discussions, negotiations, and agreements. Any amendment or modification to this Agreement must be in writing and signed by authorized representatives of both Parties.

IN WITNESS WHEREOF, the Parties hereto have executed this Financial Planning and Analysis Services Agreement as of the Effective Date.

FOR PROVIDER:

Authorized Signature

Name: _____

Title: _____

Date: _____

FOR CLIENT:

Authorized Signature

Name: _____

Title: _____

Date: _____