

FINANCIAL PLANNING AND ANALYSIS SERVICES AGREEMENT

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

Client: _____, with a principal place of business at _____ (hereinafter referred to as the "Client"),

and

Consultant: _____, with a principal place of business at _____ (hereinafter referred to as the "Consultant").

WHEREAS, the Client desires to retain the Consultant to perform Financial Planning and Analysis (FP&A) services, and the Consultant agrees to perform such services under the terms and conditions set forth set forth below.

NOW, THEREFORE, the Parties agree as follows:

1. SCOPE OF SERVICES

The Consultant shall perform the following FP&A consulting services for the Client:

1. Financial modeling, forecasting, and budget preparation support.
2. Variance analysis, performance reporting, and key performance indicator (KPI) tracking.
3. Strategic financial planning, decision-support analysis, and advisory services.
4. Other related financial analysis services as mutually agreed upon in writing.

2. TERM OF AGREEMENT

This Agreement shall commence on _____ and shall continue until:

1. Completed on _____, or
2. Terminated by either party giving _____ days written notice to the other party.

3. COMPENSATION AND PAYMENT

In consideration for the services provided by the Consultant, the Client shall pay the Consultant as follows:

1. **Rate:** The Client shall pay the Consultant at the rate of _____ per _____.
2. **Invoicing:** The Consultant shall submit invoices to the Client _____.
3. **Payment Terms:** All invoices shall be due and payable within _____ days from the invoice date.

4. CONFIDENTIALITY

The Consultant acknowledges that during the performance of this Agreement, the Consultant may have access to confidential, proprietary, and financial information of the Client. The Consultant agrees to maintain the strict confidentiality of all such information and shall not disclose it to any third party without the prior written consent of the Client.

5. OWNERSHIP OF WORK PRODUCT

All reports, financial models, templates, dashboards, and other deliverables created by the Consultant specifically for

the Client under this Agreement shall become the sole and exclusive property of the Client upon receipt of full payment.

6. INDEPENDENT CONTRACTOR RELATIONSHIP

The Consultant is an independent contractor and is not an employee, partner, or agent of the Client. The Consultant shall be solely responsible for all tax obligations, insurance, and professional registrations associated with the performance of services under this Agreement.

7. LIMITATION OF LIABILITY

The Consultant shall not be liable to the Client for any indirect, incidental, special, or consequential damages arising out of the performance of the services. In no event shall the Consultant's total liability under this Agreement exceed the total fees paid by the Client to the Consultant under this Agreement.

8. GOVERNING LAW

This Agreement shall be governed by, and construed in accordance with, the laws of the State of _____, without regard to its conflict of laws principles.

9. ENTIRE AGREEMENT

This Agreement constitutes the entire understanding between the Parties regarding the subject matter hereof and supersedes all prior agreements, representations, or understandings, whether written or oral.

IN WITNESS WHEREOF, the Parties hereto have executed this Financial Planning and Analysis Services Agreement as of the date first written above.

CLIENT

CONSULTANT

Signature

Signature

Printed Name

Printed Name

Title

Title

Date

Date