

# STRATEGIC FINANCIAL PLANNING SERVICES AGREEMENT

This Strategic Financial Planning Services Agreement (the "Agreement") is entered into and made effective as of \_\_\_\_\_ (the "Effective Date"), by and between:

**Provider:** \_\_\_\_\_, with a principal place of business at \_\_\_\_\_, and

**Client:** \_\_\_\_\_, with a principal place of business at \_\_\_\_\_.

## 1. SCOPE OF SERVICES

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The Provider agrees to provide strategic financial planning and analysis services to the Client, which shall include, but are not limited to, the following:

1. Financial forecasting, budgeting, and variance analysis.
2. Strategic evaluation of business opportunities, capital allocation, and cash flow modeling.
3. Preparation of periodic financial performance reports and presentations for management.
4. Other advisory services as mutually agreed upon in writing.

## 2. COMPENSATION AND PAYMENT TERMS

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

1. **Service Fee:** The Client shall pay a fee of \_\_\_\_\_ per \_\_\_\_\_.
2. **Invoicing:** Invoices will be issued \_\_\_\_\_ and shall be payable within \_\_\_\_\_ days of receipt.
3. **Expenses:** The Client shall reimburse the Provider for pre-approved, reasonable out-of-pocket expenses incurred in the performance of the services.

## 3. TERM AND TERMINATION

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This Agreement shall commence on the Effective Date and shall continue until \_\_\_\_\_, unless terminated earlier. Either party may terminate this Agreement at any time, with or without cause, by providing \_\_\_\_\_ days written notice to the other party.

## 4. CONFIDENTIALITY

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The Provider agrees to keep all financial information, business plans, and proprietary insights of the Client strictly confidential and shall not disclose any such information to third parties without prior written consent from the Client.

## 5. OWNERSHIP OF WORK PRODUCT

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All reports, financial models, spreadsheets, and other documents prepared by the Provider specifically for the Client under this Agreement shall be the sole and exclusive property of the Client upon full payment of all fees due.

## 6. GOVERNING LAW

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

IN WITNESS WHEREOF, the parties hereto have executed this Strategic Financial Planning Services Agreement as of the Effective Date.

**PROVIDER:**

**CLIENT:**

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date