

Charlo Maurer - Peace of Money

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Financial Planning Services Agreement

Set forth below is the basis upon which Charlo Maurer will furnish financial planning services to the client:

1. Charlo Maurer will review, in detail, the Client's current financial position including assets, liabilities, cash management, insurance, estate planning and other detailed factors pertaining to Client's financial position, individual goals and future objectives. In order to enable Charlo Maurer to make the above review, the Client will furnish her with a copy of such documents as may reasonably be requested.
2. The advisor recommends annual reviews of investments. Any investment recommendations are based on their being appropriate and strong performing funds at the time of our meeting..
3. All information and advice furnished by either party to the other shall be treated as confidential and shall not be disclosed to third parties except as required by law or with mutual consent.
4. It is agreed and understood that Charlo Maurer will at no time take possession of, or exercise discretion over any of the Client's investments or property. While she will make recommendations and give advice concerning the purchase, sale or retention of Client's securities or property, the final decision to implement such a recommendation will always be made by the Client. Charlo will not monitor the Client's investments between appointments.
5. It is agreed and understood that Charlo Maurer in no event will accept or receive fees, commissions or other remuneration or compensation of whatever kind or description from advisors, sponsors, or distributors of investments recommended to the Clients of Charlo Maurer.
6. The contract for these services shall be on an hourly basis at a rate of \$160 per hour with the client. Rates are guaranteed for one year from the date of signature.
7. Client understands that anytime within thirty business days after the date of entering into this agreement with Charlo Maurer, the client may terminate this agreement without penalty and will receive a complete refund of any fees paid to Charlo Maurer. Charlo may also terminate the contract if she determines that the client is not a good match for her services.
8. The client will pay an hourly fee if he/she cancels an appointment in less than 24 hours.
8. On an annual basis, Charlo Maurer will offer the Client a copy of Charlo Maurer's Form ADV (state registration form) I have received a copy of Peace of Money's current ADV. _____

Client Name: _____

Signature: _____ Date _____

Client Name: _____

Signature: _____ Date _____