



FINANCIAL PLANNING AGREEMENT

1501 Hull Ave
Westchester, IL 60154

Client Name:	
Client Address:	
Client Phone:	

Client engages Aristide Partners LLC (“Aristide Partners”) for financial planning services. Aristide Partners hereby accepts appointment and fiduciary duty of utmost good faith to act solely in the best interests of each client pursuant to the terms and conditions set forth in this Agreement and to comply with impartial conduct standards of:

- Charging no more than reasonable compensation for services provided; and
- Making no misleading statements regarding investments, compensation and conflicts of interest.

Financial plans will be performed for one or more of the following areas:

Retirement Planning	Investment Planning	Divorce Planning
Succession Planning	Budget Planning	Debt Management Planning
College / Education Planning	Personal Financial Planning	Business Exit Planning
Legacy Planning	Tax Planning	Cash Flow Analysis
Insurance Planning	Major Purchase Planning	Other: _____

Aristide Partners charges a fixed fee for financial planning. Prior to the planning process the Client will be provided an estimated plan fee. Services are completed and delivered inside of thirty (30) days contingent upon timely delivery of all required documentation. Client may cancel within five (5) business days of signing Agreement with no obligation and without penalty. If the Client cancels after five (5) business days, any unearned fees will be refunded to the Client, or any unpaid earned fees will be due to Aristide Partners. Aristide Partners reserves the right to waive the fee should the Client implement the plan through Aristide Partners. Aristide Partners will send the Client a check when refunding a Client.

