



LifePoint Planning

2019

Sample Client

1234 Park Ave, Sampleville, MI 90210

Sample Client:

Thank you for the opportunity to meet with you. I welcome the opportunity to work with you as your financial planner. This engagement letter outlines the specific terms of the financial planning engagement between:

LifePoint Planning/Doug Oosterhart, CFP® and Sample Client

If the scope or terms of the financial planning engagement change, they should be documented in writing and mutually agreed upon by all parties to the engagement.

Please be assured that all information that you provide will be kept strictly confidential. During the financial planning engagement, I may, on occasion, be required to consult with other third-party professionals (attorney, accountant, etc.) to make sure all matters of the financial plan are accurate.

As discussed during our introductory meeting, this engagement will include all services required to develop a comprehensive financial plan. These services will specifically include:

- Reviewing and prioritizing your goals and objectives.
- Developing a summary of your current financial situation, including a net worth statement, cash flow summary, and insurance analysis.

(517) 604-0229



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333 Albert Ave #633, East Lansing, MI 48823





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- Reviewing your current investment portfolio and developing an asset management strategy.
- Developing a financial management strategy, including financial projections and analysis.
- Completing a retirement planning assessment, including financial projections of assets required at estimated retirement date.
- Identifying tax planning strategies to optimize financial position.
- Presenting a written financial plan accompanied by an analysis that will be reviewed in detail with you. It will also contain recommendations designed to meet your stated goals and objectives.
- Developing an action plan for the stated recommendations.
- Assisting you with the implementation of the financial plan.
- One (1) official meeting each quarter during year one of the engagement to make sure all items are being implemented correctly.
- Investment Management optimization. Fee/value x-ray.
- Asset location strategy: making sure the correct investments are held in the correct accounts.
- Retirement distribution strategies.
- Business sale consulting.

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This will be an on-going professional relationship. At a minimum, we will meet on an annual basis (generally there is more meetings at the beginning of our engagement) to ensure the plan is still appropriate for you. Either party may terminate this agreement by notifying the other in writing. Any fees incurred prior to the date of termination will be payable in full.

The firm's services will be charged on a percentage basis until flat-fee minimum is met. The client will get 90 days' notice if the firm's fee increases or decreases. For the first year of service, the fee will be X dollars annually, paid monthly (quarterly), in advance.

This includes development and delivery of your financial plan and unlimited email communication. Fees are paid through TD Ameritrade Institutional's platform directly out of the client's account(s) or out of pocket.

The firm has no known conflicts of interest in acceptance of this agreement. I commit that I will advise you of any conflicts of interest, in writing, if they should arise.

If there are any questions regarding this letter of engagement, please reach out to Doug Oosterhart directly.

I look forward to working with you and helping you reach your financial goals.

Sincerely,

Doug Oosterhart, CFP®
Founder

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CFP® Professional:

I accept the terms of this engagement letter.

Client:

I accept the terms of this engagement letter.

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