



## initial agreement.

### **client service agreement**

per this agreement, you are becoming a client of millennial financial planning LLC (mfp.). this document outlines the expectations for both parties. the undersigned client agrees that MFP's services are provided at the price of \$420.00. the planning fee of \$420.00 can be paid in full or as \$35.00 monthly installments for a 12 month period. the initial agreement includes a service period of one year (12 months), a comprehensive financial plan, and continued service for the areas listed below and in ADV Part 2.

### **termination**

if you choose the \$35.00 monthly payment option, and choose to terminate this agreement within the initial 12 month period, the remaining balance of the \$420.00 fee will be due immediately. nonpayment of this fee will result in your balance being sent for collections and possibly reported to your consumer credit report.

### **ongoing services**

upon completion of the initial 12 month service period, either mfp. or you may end this agreement and any further service. ongoing services beyond the initial 12 month period may be billed at \$35.00 per month on a month-to-month basis, or paid in full at \$420.00 for another one year of service. the choice of these payment options is at the client's discretion. after the initial 12 month period, mfp.'s services may be cancelled at any time with 30 days written notice. If you have paid in full for another one year period, and cancel within those 12 months, you will be refunded in full at the rate of \$35.00 per month for each month remaining in this new period.

### **services provided**

this list serves as the most common subjects and services mfp. may provide to you as a client. this list may not include, or exclude, any and all other subjects or services mfp. may provide to you based on your needs and goals. please refer to ADV Part 2 for more information. mfp.'s services may include: budgeting/cash flow analysis, student loan analysis, debt management, workplace retirement plan review, tax planning, retirement planning, college planning, goal setting, asset allocation strategies, insurance analysis, risk Management, estate planning.

### **written disclosure acknowledgment**

you acknowledge receiving mfp.'s ADV Part 2 and privacy policy no later than the date of signing this agreement.

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signature & date