



**VIGIL TRUST & FINANCIAL ADVOCACY  
CONSULTING AGREEMENT**

The undersigned ("Client") hereby retains Vigil Trust & Financial Advocacy ("Vigil") as a personal financial consultant to review financial matters and provide written recommendations concerning **(circle all that apply)**: divestment planning only, investment recommendations and analysis, estate and tax planning for a fee of \$\_\_\_\_\_.

Client understands and agrees that 50% of Vigil's charges for these services will be due and payable upon signing this Agreement and that the balance will be due upon Vigil's presentation to Client of its final written report. Client agrees to pay these charges as follows:

\_\_\_\_\_ By check. Initial payment is enclosed.

\_\_\_\_\_ By credit card.

Type (circle one): VISA      MASTERCARD

Account number \_\_\_\_\_ Exp. date \_\_\_\_/\_\_\_\_/\_\_\_\_.

I hereby authorize debit of the above account in accordance with the terms of this agreement.

\_\_\_\_\_  
Signature of Client Cardholder      Date \_\_\_\_/\_\_\_\_/\_\_\_\_.

Client agrees to promptly provide such information and complete such forms as Vigil shall from time to time reasonably require to fulfill its duties under this Agreement. Vigil agrees to deliver its written report no later than four weeks after its last receipt of the information it requires to complete its review.

It is understood that Vigil's report will contain recommendations only and that Vigil does not assume any liability or responsibility for the implementation of its recommendations unless separately retained to do so. Since Vigil does not provide legal drafting or brokerage services, any such implementation services are limited to working through appropriate professionals selected by Client or, in the absence of Client designation, by Vigil, to assure the attainment of the recommended result in exchange for fees determined in accordance with Vigil's standard fee schedule for those services as published from time to time.

The recommendations made in Vigil's final report are based upon circumstances existing at the time of preparation of the report. Legal, investment, tax, personal or other changes subsequent to the date of the report cannot be contemplated and yet if known might substantially influence the recommendations. It is suggested that the report be updated periodically to assure ongoing validity of the recommendations contained in it, but Vigil assumes no responsibility or obligation to update or supplement its report unless specifically requested by Client in the future.

This Agreement may be terminated by Client within 5 days of its signing without charge. Vigil cannot assign its obligations under this Agreement without the written consent of the Client.

By signing this Agreement, Client acknowledges receiving a copy of this Agreement.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

**CLIENT:** \_\_\_\_\_,