

FINANCIAL PLANNING AND CONSULTATION AGREEMENT

This Agreement is entered into between _____ ("Client"), and McIlrath & Eck, LLC ("Advisor") this _____ day of _____, 20 _____. In consideration of the mutual benefits to be derived from this Agreement, it is understood and agreed as follows:

SERVICES

Financial Planning Services. Advisor provides consulting services to Client regarding Client's financial goals and objectives, as selected below:

- \$850 Standard Financial Plan.** This entails preparing a Financial Plan, and furnishing Portfolio Research and Asset Allocation recommendations as to the present financial resources among different types of assets including investments, savings, and insurance with a view toward better correlating the assets with the Client's financial planning objectives. At the point of engagement, \$425 is required to begin preparation of the Financial plan, with the remaining \$425 due upon completion of the Plan.
- \$350 Financial Plan Review/Update.**
- \$1000 Standard Financial Plan with one annual Financial Plan Review/Update Included.**
- Other** \$ _____

Consultation Services. Advisor provides consulting services *only* to Client regarding Client's financial goals and objectives. An invoice will be presented upon completion of the consulting services, and is payable on receipt.

- \$220 per hour**

We accept cash or check. Checks payable to: McIlrath & Eck, LLC

AGREEMENT

Client Responsibility. The Client recognizes that the value and usefulness of the services of Advisor will be dependent on information provided by Client and on Client's active participation in the formulation and implementation of recommendations made by Advisor to attain those objectives. The Client and Advisor will complete both a detailed initial confidential questionnaire as well as a risk tolerance questionnaire (Finametrica). The Client will provide copies of such documents as Advisor may reasonably request in order to permit complete evaluation and preparation of recommendations to the Client.

Implementation. Client is under no obligation to execute any investment transactions recommended by Advisor, or to use any specific broker for implementation of the recommendations so made,

including any broker which may be recommended by Advisor. Implementation of any recommendations of Advisor is entirely at Client's discretion.

Termination/Assignment. Client or Advisor may terminate this Agreement at any time upon written notice. This Agreement shall not be assigned by Advisor without the written consent of Client.

Governing Law. Investment advisor services performed by Advisor shall be in compliance with the Investment Advisor Act of 1940, rules and regulations thereunder, and applicable Washington state laws regulating the services provided by this Agreement.

Acknowledgment. Client acknowledges receipt of Advisor's Form ADV, Part II, as required under the Investment Advisors Act of 1940 and Advisor's Privacy Policy.

Date: _____

Signature

Signature

McIlrath & Eck, LLC
Registered Investment Advisor

By: _____