

[Firm Name]

[Street Address]
[City, State, Zip]
[Email/Phone]

INVOICE

NO: [000]
DATE: [DATE]

Client:

[Client Name]
[Client Address]
[Client Account #]

Payment Terms:

Due on Receipt
Method: [Wire/ACH/Check]

DESCRIPTION OF ADVISORY SERVICES	PERIOD	FIXED FEE
[Service Name: e.g., Quarterly Retainer / Financial Planning Fee]	[MM/DD/YY] - [MM/DD/YY]	\$0.00
[Additional Service: e.g., Tax Strategy Review]	-	\$0.00

Subtotal: \$0.00
Tax: \$0.00
Total Due: \$0.00

Notes: Fees are calculated based on the agreed fixed-fee schedule. No commission or asset-based percentages are included in this invoice.

Thank you for your continued trust in our financial guidance.