INVOICE

[Advisory Firm Name]
[Street Address]
[City, State, Zip]
[Email/Phone]

Invoice #: [000]
Date: [MM/DD/YYYY]
Due Date: [MM/DD/YYYY]

Client:
[Client Name]
[Client Address]
[Client Email]

Date	Description of Advisory Services	Hours	Rate ($)	Amount ($)
[Date]	Portfolio Review & Asset Allocation	[0.00]	[0.00]	[0.00]
[Date]	Tax Planning Consultation	[0.00]	[0.00]	[0.00]
[Date]	Retirement Strategy Analysis	[0.00]	[0.00]	[0.00]

Subtotal: $[0.00]

Tax: $[0.00]

Total Balance Due: $[0.00]

Payment Instructions:
Please make checks payable to [Firm Name] or pay via [Wire/Online Link].
Thank you for your business.