

INVOICE

[Advisor Name / Company]
[Street Address]
[City, State, Zip]
[Email / Phone]

Invoice #: [0000]
Date: [Date]
Due Date: [Date]

Bill To:

[Client Name]
[Client Address]
[City, State, Zip]

Description of Services	Rate/Basis	Amount
Financial Planning & Portfolio Analysis	[Flat Fee / Hourly]	\$0.00
Investment Advisory Services ([Quarter] [Year])	[% AUM]	\$0.00
Tax Planning Consultation	[Qty]	\$0.00
		Subtotal: \$0.00
		Tax: \$0.00
		Total Balance Due: \$0.00

Payment Instructions:

Please make checks payable to [Company Name] or pay via [Bank Transfer Details].

Thank you for your trust in my financial advisory services.