

PROFORMA INVOICE

Draft Advisory Agreement

[Advisory Firm Name]
[Street Address]
[City, State, Zip]
[Tax ID / Registration No.]

CLIENT INFORMATION

[Client Name/Entity]
[Client Contact Person]
[Client Address]
[Client Email]

Document #: [PRO-000]
Date: [Date]
Valid Until: [Date]
Currency: [USD/EUR/GBP]

Service Description	Rate/Basis	Qty/Hours	Amount
Strategic Financial Planning Comprehensive review of capital structure and growth forecasting.	[Rate]	[Qty]	[0.00]
Investment Advisory Fees Quarterly management based on Assets Under Management (AUM).	[Rate]	[Qty]	[0.00]
Tax Optimization & Estate Review Coordination with legal counsel for trust restructuring.	[Rate]	[Qty]	[0.00]

Service Description	Rate/Basis	Qty/Hours	Amount
Compliance & Regulatory Reporting Filing assistance and annual audit readiness.	[Rate]	[Qty]	[0.00]

Subtotal: [0.00]
Tax ([0] %): [0.00]
Total Payable: [0.00]

Payment Terms & Notes:

- This is a proforma invoice provided prior to the formal issuance of services.
- Wire Transfer Instructions: [Bank Name] | SWIFT: [Code] | Account: [Number]
- Please reference document number [PRO-000] on all remittances.
- Professional services are subject to the terms of the Master Advisory Agreement.