Client Consent Form for Financial Advisory Services

A **client consent form sample** for financial advisory services ensures clear communication and legal compliance by outlining the client's approval of the advisory process. This document protects both the advisor and client by detailing terms, confidentiality, and consent to proceed with financial recommendations. Using a standardized sample streamlines onboarding while enhancing trust and transparency.

Client Name:

Financial Advisor Name:

Description of Services:

Financial planning, investment advice, portfolio management, and related financial advisory services.

Terms & Conditions:

1. The financial advisor will maintain strict confidentiality of all disclosed information.
2. Recommendations are based on available data and client-provided information.
3. The client may accept or reject any advice presented.
4. All information provided is accurate to the best of the client's knowledge.

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I, the undersigned client, consent to engage in financial advisory services as outlined above and acknowledge understanding of the terms and confidentiality commitments.

Client Signature:

Date:

Submit Consent