# Wealth and Business Planning Group, LLC

ADDENDUM (A) TO FINANCIAL ADVISORY AGREEMENT

Written Report of Recommendations

This Addendum becomes an integral part of the Wealth and Business Planning Group, LLC Financial Advisory Agreement when signed by the Client.

Whereas Client is desirous of retaining Advisor for the purpose of reviewing the Client's present financial situation and issue a written report of recommendations. The Advisor will continue to be available to advise regarding implementation of Client's financial plan for the next twelve months.

(1) **COVERAGE:** Advisor will deliver to Client a written report concerning analyses of Client's specific situation which may include any or all of the following as required by the Client's current situation.

A.____ Definition of Goals and Objectives.

B.____ Analysis of Client's current financial situation, including cash flow, debt management, and investments.

C.____ Projection of cash flow and income tax liability based on Client's current financial situation and current tax law and regulations.

D. ____ Alternative ways to provide the funding required to achieve the Client's specified goals.

E.____ Projection of Client's cash flow and income taxes based on implementation of the recommendations and current tax law and regulations.

F. ____ Analysis of Client's current risk management program and specific recommendations regarding appropriate types, levels and approximate costs of coverage.

G.____ Analysis of Client's estate situation and recommended actions to achieve estate objectives. (You will need to consult a qualified attorney for legal advice and necessary documents.)

H.____ Identification of actions explaining how Client might best implement the recommendations.

(2) **COMPENSATION:** Fees referenced in Paragraph 8 of the Financial Advisory Agreement are as follows: _____
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The above fee is payable one-half upon execution of the Agreement and this Addendum. The balance is due upon delivery of the Financial Plan.

**By** _____ **By** _____

Client Signature Client SS # Joint Client (if any) Jt Client SS#

Printed Name of Client Printed Name of Joint Client

_____

Address: Street City State ZipCode

**By** _____ **By** _____

Signature of Authorized Signer for WBPG, LLC Signature of Advisor Associated Person