



**G-SQUARED ADVISORY**

Financial Planning Especially for Women

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## Client Agreement

This agreement describes the terms and conditions regarding the financial planning services that we, G-Squared Advisory LLC, will provide to you.

### **SERVICES TO BE PERFORMED**

We will provide you with financial planning and investment services tailored to your needs. Generally, you will request advice on specific financial/investment issues, and if it is within our capabilities, we will gather the necessary data, perform the applicable analyses and provide you with the desired advice. Advice will normally be delivered in writing, but it may be verbal. The decision (if, when and how) to implement our recommendations is entirely yours. If requested, we will assist you with the implementation process.

### **SERVICE LIMITATIONS**

We will not evaluate any insurance contract, nor will we provide detailed property and casualty, health, long-term care, or liability insurance analyses. We will not prepare tax returns or provide advice regarding tax law. We will not prepare legal documents or provide legal advice. You should look to other professionals for these services. Additionally, we will not take custody of your assets nor will we assume discretionary control over your investments.

### **FEE STRUCTURE**

Our fee is \$250 per hour plus any applicable third-party charges. Hourly fees are prorated in half hour increments. You will be billed for third-party material and/or services that are purchased specifically for you and approved in advance by you. You will be given a fee range estimate for projects that are expected to exceed \$250. Generally, fees are payable when the advice is delivered to you. However, we will invoice you monthly if the advice is provided in small increments over a period of time. Legal, investment, insurance and/or accounting fees that you might incur as a result of implementing our recommendations are not included in our fee.

### **DISCLOSURES**

We are not associated with any financial services company, and you are free to select any financial services company you desire to implement our recommendations. We are not aware of any conflicts of interest at this time. If a conflict should arise, we will disclose it to you at that time.

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G-Squared Advisory LLC  
180 E. Prospect Ave. #125  
Mamaroneck, NY 10543

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A financial plan, by itself, cannot assure that retirement or other financial goals will be met. Securities products are not FDIC insured, have no bank guarantee and may lose significant value. Services are intended for individuals residing in the United States, however, all products and services may not be available in all states. This is not an offer to buy or sell securities, which can be done by prospectus only. This correspondence may refer to a research report or information provided by third parties. G-Squared Advisory LLC does not represent that such information is accurate or complete and it may be updated in the future. Past performance is not indicative of future returns.



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### CONFIDENTIALITY

We will only use the information you provide to perform the analyses and provide the advice you desire. We will not disclose that information to anyone else for any other purpose unless required by law.

### FORM ADV PART II DELIVERY

By signing this agreement you acknowledge that you have received, read and understand the current version of our SEC Form ADV Part II.

### MARRIED CLIENTS

We consider you, a married couple, to be one client. Each of you agrees that any information given to us by one partner may be shared with the other partner.

### TERMINATION

You and we each have the right to terminate this agreement at any time, with or without cause, by notifying the other party with the desire to do so. The agreement will automatically terminate one year after the date that you and we sign it. Thereafter, a new agreement will be required to continue our services.

### MEDIATION

If a dispute arises out of our engagement, and it cannot be settled through negotiation, you and we agree to try to settle it by mediation before resorting to arbitration, litigation or some other dispute resolution procedure. The American Arbitration Association or another suitable group will be selected to administer the mediation.

### GUARANTEES

We do not guarantee any projection (e.g., investment rate of return, inflation rate, asset accumulation, or cash flow) we use or make, nor do we guarantee that you will achieve your financial goals if you follow our recommendations. However, you do not have to pay for our services if you are not satisfied with those services. If you are dissatisfied, send us a written notice within 30 days from the date that the services were provided, and we will refund any amounts paid for those services.

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Client Name

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Client Name

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Cindy Golub, Principal

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Date

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Laurie Girsky, Principal

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Date

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