



Engagement Agreement for Family Office Services

This Agreement is entered into between Heritage Trust Company Inc. ("Heritage Trust") and _____ ("the Client").

Scope of Services: Heritage Trust agrees to provide family office services to the Client, including but not limited to:

- Document management and record keeping; and
- Expense management, including bill payments and basic bookkeeping.

Additional services could include financial support and education for family members.

Compensation: The Client agrees to pay the Service Provider at a rate of \$250 per hour for the services rendered. Invoices will be submitted on a quarterly basis and are due within 30 days of receipt.

Out of Pocket Expenses: The Client agrees to reimburse the Service Provider for any reasonable and necessary expenses incurred in the course of providing the agreed-upon services. Such expenses will be pre-approved by the Client in writing.

Confidentiality: Both parties agree to maintain the confidentiality of any information exchanged during the course of this engagement. Confidential information includes but is not limited to financial data and personal information.

Termination: Either party may terminate this agreement by providing written notice to the other party. In the event of termination, the Client agrees to pay for all services rendered up to the date of termination.

Entire Agreement: This agreement constitutes the entire understanding between the parties and supersedes all prior agreements, whether oral or written.

Amendments: Any amendments to this agreement must be in writing and signed by both parties.

Dated at _____ this _____ day of _____, 2025.

Client

HERITAGE TRUST COMPANY INC.