



## 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.

**Technology Fee:** A technology fee of 5% will be applied to all Heritage Trust fees. This fee supports secure digital infrastructure, document management systems, cyber protection, fiduciary software, and related administrative technologies required to deliver services efficiently and safely.

**Overdue accounts:** Any invoice issued by Heritage Trust Company Inc. is due within 30 days of the invoice date. Amounts unpaid after the due date will bear interest from the due date until paid in full at the prime rate announced by Heritage Trust's primary Canadian chartered bank from time to time plus 2% per annum, calculated daily and charged monthly.

**Loans to estates and trusts:** If an estate or trust lacks liquidity, Heritage Trust Company Inc. may advance funds to pay expenses, taxes, or professional fees. Any advance is a loan owing to Heritage and will bear interest from the date of advance at the prime rate announced by Heritage Trust's primary Canadian chartered bank from time to time plus 2% per annum, calculated daily and charged monthly, and will be reimbursed from the first available estate or trust funds, including sale proceeds, before any distributions.

**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.



Heritage  
Trust

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**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 \_\_\_\_\_, 2026.

\_\_\_\_\_  
Client

\_\_\_\_\_  
**HERITAGE TRUST COMPANY INC.**