



LETTER of ENGAGEMENT

Wings for Widows has agreed to provide services to the Client only on the terms and conditions set out in this Letter of Engagement (the “Letter”).

1. Scope of Work

Wings for Widows provides financial coaching by a licensed, professional financial advisor to new widows following the death of their spouse. By providing coaching, education, and guidance we help you “organize, prioritize, and stabilize” the practical matters following the loss of a spouse. Every person’s situation is different, so each receives coaching tailored to her circumstances. Wings for Widows is to provide the following services during our engagement:

- Provide you with a copy of The New Widow’s Guide to Financial Wellness;
- Understand your current financial situation, aided by your taking our confidential Progress Check (questionnaire);
- Help you organize your documents, protect your credit, discuss the most pressing priorities given your situation, and address many topic areas to insure your loss isn’t compounded by missed opportunities and costly mistakes;
- As necessary and upon request, refer you to professional service providers should your specific needs go beyond the scope of our services.

2. Term of Engagement

This Engagement will begin on the date below and continue for 2-4 coaching sessions, generally. Each session is approximately 90 minutes. All coaching sessions are “virtual” using Zoom or other platform as appropriate. It is recommended that the entire engagement is completed to maximize the effectiveness of your coaching. All Zoom meetings are recorded for your playback and for training purposes with your coach; all recordings are secure (see our privacy policy).

3. Termination of Engagement

Either party may seek termination of this Engagement at any time for any reason, without notice.

4. Compensation

Wings for Widows will provide services, as described in Scope of Work, at no cost to the Client.

5. Independent Contractor

Wings for Widows is acting as an independent contractor in providing services under this Letter, not as an employee. The parties agree that this Letter does not create a joint venture or a partnership between them.

6. Integration

This Letter contains the entire understanding by and between the Client and Wings for Widows and no representations, promises, agreements or understandings, written or oral, not herein contained shall be of any force or effect.

7. Choice of Law

This Letter and the performance under this Letter and all suits and special proceedings under this Letter, be construed in accordance with and governed by the laws of the State of Minnesota.

SIGNED / RECEIVED BY CLIENT on this ____ day of _____, 20__.

Client Name

Client Signature

Please return this signed and dated letter in the envelope provided to Wings for Widows, c/o 26405 Noble Road, Excelsior, MN 55331 or you may scan and email to info@wingsforwidows.us.