

ENGAGEMENT LETTER

THIS AGREEMENT is made this _____ day of _____, 2019 by **The Truth Consulting Company, Inc.** (Company) and **DDS**, (Customer).

We are pleased to accept your engagement to provide you with consulting services on an ongoing basis. This agreement's purpose is to define the capacity of **The Truth Consulting Company, Inc.** and to help set forth the conditions and expectations under which **The Truth Consulting Company, Inc.** will work on your behalf.

We shall have full discretion, subject to your prior approval, to engage our own employees, subcontractors or third parties to perform the Services described in Section 1. Any employee or subcontractor we contract with shall be considered an extension of **The Truth Consulting Company, Inc.** and subject to any confidentiality agreements and provisions **The Truth Consulting Company, Inc.** may be subject to while working for **DDS**, (Customer).

Work shall be performed either as task-based (fixed price) or hourly, depending on the circumstances or in the case of troubleshooting technical problems. Work may be requested in person, by phone, text messages or email and always by unilateral agreement. **The Truth Consulting Company, Inc.** will quote estimates for tasks and seek approval by one or more of the above methods. Usually a Scope of Work shall be provided to Customer at every opportunity for approval or guidance.

We will submit itemized invoices for work performed every thirty (30) days. Large expense items and task-based items (pre-approved by Customer) will be billed as incurred. Typically invoices will show the individual performing the work as well as the rate on an hourly basis. The Company reserves the right to withhold or terminate services at any time if Customer fails to pay invoices in a timely manner. The Customer may also request that the Company provide billing updates from time to time to aid budgetary control.

No agreement between the Company and the Customer shall preclude future services for other customers deemed adverse or in competition, directly or indirectly, with the Customer. We understand that during the course of this engagement we may encounter sensitive or confidential information relating to the Customer's business, customers, patients, vendors and method of doing business. The Company shall never disclose in any shape or form any confidential information, trade secrets, practices, methods or any information deemed sensitive and not made available to the public.

We value our relationships with our customers, and we look forward to working with you on all future matters.

Sincerely,

Tony Myers

President

Customer Initials _____ Company Initials _____

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SECTION 1:

1. Evaluation and analysis of insurance coverages.
2. Evaluation and analysis of financial products and services.
3. Evaluation and analysis of legal documents.
4. Evaluation and analysis of real estate investments to include your personal residence.
5. Evaluation and analysis of your business or businesses.
6. Evaluation and analysis of your business and/or personal accounting.
7. Evaluation and analysis of your business and/or personal loans.

Monthly Fee: \$ 375 Months 1-6; \$ 500 thereafter.

- **Monthly meeting to review Best Practices data**
- **Monthly meeting to discuss practice management efficiency**
- **Quarterly meeting with accountant for financial practice management review**
- **Annually meeting between September and October with accountant or other tax advisor(s) to implement tax planning strategies.**
- **Quarterly meeting with Investment Advisor to review performance and efficiency**
- **Annual meeting with Insurance Advisor to maximize protection and minimize costs**
- **Quarterly meeting to review revenue growth and projections**

Customer Initials _____ Company Initials _____

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