



Summary of Work Performed for EFA Consulting

Consulting Client #1 _____

Consulting Client #2 _____

Advisor Name(s) _____

This form can be used to help document the work pursuant to your consulting agreement and help substantiate the fee charged. Complete this form and return to ESI at the time full payment is submitted.

Checks should be payable to ESI Financial Advisors or EFA and mailed to Equity Services, Inc. One National Life Drive Montpelier VT 05604.

Hours Spent

Topics Discussed

Documents Reviewed

Recommendations Made

Action Steps for The Rep

Action Steps for The Client

Additional Detail About the Work