

Engagement Letter

Stratworth Advisory Ltd | Company number 16078743

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[Date]

[Founder name]

[Company name]

[Company address]

Dear [Founder first name],

Thank you for choosing Stratworth. Following your Founder Discovery Session, this letter records the Plan we have recommended, what we have agreed to work on together and the commercial details of your engagement.

1. Your engagement

Client	[Company name]
Founder / principal contact	[Founder name]
Recommended Stratworth Plan	[Essentials / Advisory+ / Exit Programme / Bespoke]
Start date	[Date]
Minimum term	Six months
Monthly fee	[£___] [plus VAT if applicable]
Minimum Plan commitment	[£___ – six monthly Plan fees] [plus VAT if applicable]
Founder Discovery credit	[£500 / Not applicable]
First Plan payment	[£___ after Discovery credit / £___ if not applicable]
Subsequent monthly payments	[£___] [plus VAT if applicable]
Payment	[Monthly in advance by recurring payment / As agreed]

2. Introduction

Introduced to Stratworth by: [Name / firm / Not applicable]

Introduction arrangement: [No referral remuneration / Stratworth will pay the introducer £___ / Stratworth will pay the introducer ___% of fees received / Other: ___ / Not applicable]

Where Stratworth pays an introduction or referral fee, this does not increase the fees payable by you to Stratworth unless expressly stated above.

3. What you want to achieve

Based on our Discovery work, the principal outcomes we have agreed to work towards are set out below. They give our conversations direction, but they are not guaranteed outcomes and may evolve as your circumstances and priorities change.

- [Priority / objective 1]
- [Priority / objective 2]
- [Priority / objective 3]

4. What we have agreed to work on

Stratworth will provide founder-to-founder strategic and consultative business advice. Our role is to share experience, challenge thinking, identify issues and options, and help you make informed decisions about your business.

Our initial focus will be:

- [Agreed focus / workstream 1]
- [Agreed focus / workstream 2]
- [Agreed focus / workstream 3]

Your Plan includes: [insert the advisory time, Strategy Days if applicable, quarterly reviews, Stratworth Vault access and any other services included in the recommended Plan].

The scope can evolve by agreement as the engagement develops. Any material additional work or change in fees will be agreed with you before it is undertaken.

5. Your SCALE2SELL® journey

During the first six months, we will work through the staged SCALE2SELL® journey using the Stratworth Vault, Toolkits, Executive Dashboard and Quarterly Readiness Reviews. The framework gives our work structure, but our conversations and priorities will remain focused on what matters most to you and your business.

Where the engagement continues beyond Month 6, the Executive Dashboard and Readiness Radar continue on a quarterly rhythm and our advisory work follows the priorities identified together.

6. Nature of our advice

Our work may include growth, business value, management readiness, succession and exit, depending on the priorities and scope agreed above. You remain responsible for deciding whether, when and how to act on our advice and for the commercial decisions you make.

Our engagement does not include regulated financial or investment advice, legal, tax or accounting advice, formal business or share valuations, transaction execution, capital raising, buyer or investor introductions, brokerage or corporate-finance services. Where specialist advice is required, you should obtain it from an appropriately qualified professional.

7. Working together

Nik Spencer will normally lead your advisory work. Sessions will be arranged by agreement and are subject to availability.

We ask that you provide reasonably complete and accurate information, make the appropriate people available where needed, complete reasonable preparation for our work together and tell us if your circumstances or priorities materially change.

Our relationship works best as an open and confidential founder-to-founder conversation. We will challenge assumptions where we think it is useful and share relevant experience, while recognising that the final decisions remain yours.

Management-team or leadership sessions will take place only where they form part of the agreed Plan or scope, or where we separately agree them.

8. Fees and minimum term

The commercial details of your Plan are shown in section 1 above. Where this engagement has a six-month minimum term, you are committing to the full six-month programme and all six monthly fees are payable whether or not you use all of the services, advisory time, reviews or materials available to you.

Where shown above, your £500 Founder Discovery fee is credited against your first Plan payment. The Discovery credit does not reduce the underlying six-month Plan fee commitment; it is a credit against the amount payable.

Each month of the staged SCALE2SELL® journey is released following receipt of the relevant monthly payment. If a payment is overdue or fails, Stratworth may pause new releases, Stratworth Vault access and advisory services until the account is brought up to date. A pause does not cancel or reduce the minimum-term payment commitment.

After the minimum term, the Plan continues monthly until cancelled before the next billing date. Any separately agreed work outside the scope above will be discussed and agreed with you before additional fees are incurred.

9. Terms of Business

This Engagement Letter should be read together with Stratworth Advisory Ltd's Terms of Business in force when you accept this engagement. Those Terms form part of our agreement and cover matters including payment, the staged SCALE2SELL® journey, advisory sessions, the Stratworth Vault, intellectual property, confidentiality, data protection, professional referrals and introductions, liability and ending or suspending an engagement.

If there is any inconsistency, this Engagement Letter will apply only to the specific commercial details of this engagement. Otherwise, the Terms of Business apply in full.

By signing below, you confirm that you have received, read and agree to this Engagement Letter and the Terms of Business.

10. Acceptance

We look forward to working with you.

Best regards,

Nik Spencer
Founder

Stratworth Advisory Ltd

Accepted for and on behalf of [Company name]

Name: [Full name]

Position: [Position]

Signature: _____

Date: [Date]

Template version 3 – 6 October 2026 | Review Draft