SACH FINANCIAL SOLUTIONS

CLIENT INVESTMENT MANAGEMENT AGREEMENT

For Contracts for Difference (CFDs), Forex & Multi-Asset Portfolio Services

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AGREEMENT DETAILS

Agreement Reference No. ____________________________

Effective Date ____________________________

Relationship Manager ____________________________

Client ID / Trading Account ____________________________

PARTIES TO THIS AGREEMENT

FIRST PARTY

SACH Financial Solutions

An investment and wealth management company providing portfolio management support and market execution services through regulated brokerage partners.

Authorized Representative : ____

Designation :____

Company Registration / License No: ______________________________________

Official Email : ____

Contact Number :____

SECOND PARTY

CLIENT / INVESTOR

Full Legal Name: ____

Nationality: ____

Residential Address: ____

Email Address: ____

Mobile Number: ____

Name of the Broker : ____

Broker Trading Account Number: ______________________________

RECITAL

This Client Investment Management Agreement ("Agreement") establishes the terms under which the Client appoints **SACH Financial Solutions** to provide portfolio management and CFD trading support services through the Client's existing brokerage account.

The Parties acknowledge that all trading activities shall be conducted in accordance with the terms, conditions, risk parameters, and commercial arrangements set forth in this Agreement.

Both Parties further confirm that this Agreement represents their complete understanding and shall become legally effective upon execution by both Parties.

ARTICLE I

PURPOSE OF THE AGREEMENT

The Client appoints SACH Financial Solutions to provide portfolio management support and execution services relating to Contracts for Difference (CFD), Foreign Exchange (Forex), Commodities, Indices, Equities, and other approved financial instruments through the Client's designated brokerage account.

The relationship established under this Agreement is intended solely to facilitate investment management services while preserving the Client's ownership and ultimate authority over the trading account.

ARTICLE II

ACCOUNT AUTHORITY

2.1 Client Ownership

The trading account shall remain the sole property of the Client at all times.

The Client retains complete ownership of:

- Trading capital
- Profits
- Account credentials
- Withdrawal rights
- Deposit rights

2.2 Trading Authorization

SACH Financial Solutions shall only execute transactions in accordance with the authority granted by the Client.

Without prior authorization, SACH Financial Solutions shall not:

- Transfer funds
- Withdraw capital
- Change leverage settings
- Modify account security
- Change banking information
- Alter risk limitations

2.3 Client Access

The Client shall maintain uninterrupted access to the trading account and shall be entitled to receive trading activity updates through the broker's reporting system together with email notifications where available.

ARTICLE III

CLIENT ASSET PROTECTION

Segregation of Funds

Client funds shall remain deposited with the selected regulated brokerage institution and shall remain separate from the operational funds of SACH Financial Solutions.

SACH Financial Solutions shall never directly hold client deposits unless specifically agreed under applicable regulations.

Insurance Coverage

Where applicable under company policy, eligible client deposits may qualify for asset protection coverage of up to: **USD 5,000,000 (Five Million United States Dollars)**

Such protection applies exclusively to losses arising from:

- Internal technical failures
- System malfunction
- Cybersecurity breaches
- Unauthorized compromise of client assets

Eligibility

Insurance benefits shall only apply where the Client maintains a cumulative net deposit of no less than: **USD 500,000** during any continuous three-month qualifying period.

Eligibility remains subject to company policy and applicable legal requirements.

ARTICLE IV

COMPENSATION STRUCTURE

SACH Financial Solutions believes in transparent pricing.

The Client shall NOT be charged:

• Hidden administration fees

• Performance incentive fees (unless separately agreed)

• Inactivity charges

• Artificial spread markups

• Undisclosed commissions

Agreed Commercial Terms

Annual Management Fee: __________ %

Profit Sharing: __________ %

Profit sharing shall be calculated on a monthly basis unless otherwise agreed.

The Client shall remain responsible only for brokerage costs, exchange fees, taxes, or government-imposed transaction charges where applicable.

ARTICLE V

RISK MANAGEMENT POLICY

To preserve capital, the following safeguards shall apply whenever possible.

Equity Protection

Where account equity reaches the agreed protection threshold of: __________ % trading activity may be suspended until further written instructions are received from the Client.

Maximum Drawdown

Monthly Maximum Drawdown: __________ %

Trade Exposure

Maximum Risk Per Trade: __________ %

These parameters may only be amended upon written approval of both Parties.

ARTICLE VI

TARGET PERFORMANCE ARRANGEMENT

Where the Parties mutually agree to a performance objective, the following commercial terms shall apply.

Expected Monthly Return: __________ %

Trading Period: 22 Trading Days

Maximum Monthly Drawdown:__________ %

Risk Allocation Per Position: __________ %

Profit Distribution:

The Client agrees to transfer __________ %

of net realized profits to SACH Financial Solutions after completion of each monthly trading cycle.

Payment shall be made to the designated company bank account or approved digital wallet specified separately by the Company.

No additional capital contributions shall be requested during the agreed monthly trading period unless initiated voluntarily by the Client.

Deposits and withdrawals shall normally be processed after completion of each monthly cycle unless exceptional circumstances require otherwise.

ARTICLE VII

REPORTING

SACH Financial Solutions shall provide account reporting upon request, including:

• Monthly Performance Summary

• Monthly/Quarterly Performance Statement

• Profit & Loss Report

• Trading Activity Report

Reports may be supplied electronically in PDF, CSV, or equivalent formats.

ARTICLE VIII

LIABILITY

SACH Financial Solutions accepts responsibility for losses directly resulting from:

- Internal operational negligence
- Unauthorized trading activity
- Technical system failures under its control
- Failure to execute agreed operational procedures
- Security incidents attributable to company systems

The Company shall not be liable for:

- Market volatility
- Liquidity shortages
- Broker insolvency
- Government intervention
- Force majeure events
- Economic or geopolitical events beyond reasonable control

ARTICLE IX

TERMINATION

Either Party may terminate this Agreement at any time by providing written notice through email or another mutually accepted communication method.

Upon termination:

- The Client shall retain unrestricted ownership of all account funds.
- Open positions shall be managed according to the Client's written instructions.
- Historical trading records shall be supplied within twenty-four (24) hours upon request.
- Outstanding profit-sharing obligations, if any, shall remain payable.

ARTICLE X

CONFIDENTIALITY

Both Parties agree to maintain strict confidentiality regarding:

- Trading strategies
- Client information
- Financial records

- Account credentials
- Investment performance

No confidential information shall be disclosed to any third party except where required by law or with written consent.

ARTICLE XI

CLIENT ACKNOWLEDGEMENT

The Client confirms and understands that:

- CFD and leveraged trading involve significant financial risk.
- Past performance does not guarantee future results.
- Investment returns are not guaranteed unless separately documented in a legally binding schedule.
- The Client has read and understood all provisions contained within this Agreement.

ARTICLE XII

GENERAL PROVISIONS

This Agreement constitutes the complete understanding between the Parties and supersedes any previous verbal or written discussions.

Any amendment shall only become effective when executed in writing and signed by both Parties.

If any provision is determined to be unenforceable, the remaining provisions shall continue in full force and effect.

EXECUTION

CLIENT

Name: ____

Signature:

____

Date: ____

SACH FINANCIAL SOLUTIONS

Authorized Representative: ________________________________

Designation: ________________________________

Signature: ________________________________

Company Stamp: ________________________________

Date ________________________________

SCHEDULE A

COMMERCIAL TERMS

Item	Agreed Value
Initial Investment	____________
Monthly Target Return	____________
Maximum Monthly Drawdown	____________
Risk Per Trade	____________
Profit Share	____________
Annual Management Fee	____________
Trading Platform	____________
Brokerage Company	____________

CLIENT BILL OF RIGHTS

By signing this Agreement, the Client shall be entitled to:

✓ Continuous ownership of all deposited funds.

✓ Full access to account statements and trading history.

✓ The right to discontinue services at any time.

✓ Transparent disclosure of all applicable fees and charges.

✓ Prompt access to trading reports upon request.

✓ Protection of confidential personal and financial information.

✓ A professional relationship conducted in accordance with applicable financial regulations and industry best practices.

The Parties acknowledge that they have carefully reviewed this Agreement, fully understand its contents, and voluntarily agree to be legally bound by its terms and conditions.