



Client Agreement & Scope Summary

This Client Agreement & Scope Summary outlines the general terms, expectations, and boundaries of your engagement with **Abraca Solutions**. It is designed to ensure clarity, professionalism, and mutual respect throughout our work together.

This document works alongside your signed proposal, intake forms, and onboarding materials.

1. Scope of Services

Abraca Solutions provides professional support services that may include (but are not limited to):

- Business clarity and strategic guidance
- Documentation and organizational support
- Branding and messaging assistance
- Operational structure and workflow guidance
- Grant or funding readiness support
- Professional writing and consulting services

Specific services, deliverables, and timelines are defined in your individual project proposal or engagement summary.

Work outside the agreed scope requires prior discussion and approval.

2. Project Boundaries

To ensure high-quality outcomes, this engagement is limited to the scope agreed upon at onboarding.

Please note:

- Requests outside scope may require additional fees or a revised agreement
- “Quick asks” that materially extend time or effort are considered scope changes
- New priorities introduced mid-project may affect timelines and deliverables

Clarity protects both client and consultant.



3. Client Responsibilities

For the engagement to proceed effectively, the client agrees to:

- Provide accurate and complete information
- Submit requested materials in a timely manner
- Participate actively in scheduled sessions or reviews
- Communicate changes, concerns, or questions promptly

Delays in client responsiveness may result in adjusted timelines.

4. Consultant Responsibilities

Abraca Solutions agrees to:

- Provide services with professionalism and integrity
- Maintain confidentiality of shared information
- Communicate clearly regarding progress, expectations, and adjustments
- Deliver work aligned with the agreed scope and objectives

Abraca Solutions does not guarantee specific financial, legal, or business outcomes, as results depend on many external factors and client implementation.

5. Communication Guidelines

Primary communication methods may include:

- Scheduled calls or sessions
- Email correspondence
- Shared documents or project platforms (if applicable)

Please note:

- Unscheduled calls, texts, or after-hours requests are discouraged
 - Emergency or expedited requests may require additional fees
 - Written communication helps ensure clarity and accountability
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6. Revisions & Adjustments

Unless otherwise stated in your proposal:

- Reasonable revisions related to the original scope are included
- Major revisions or directional changes may require additional time or fees

Revisions are intended to refine—not restart—the work.

7. Payment & Engagement Terms

- Fees, payment schedules, and refund policies are outlined in your proposal or invoice
- Work begins upon receipt of required payment and completed intake materials
- Missed sessions or delays caused by the client may not be refundable

Transparency is a priority—questions are welcome before work begins.

8. Confidentiality

All client information shared with Abraca Solutions is treated as confidential and used solely for the purpose of providing agreed services, unless disclosure is required by law.

9. Professional Boundaries

Abraca Solutions provides strategic and professional support. Services do not replace:

- Legal advice
- Financial advising
- Tax or accounting services
- Medical or mental health services

Referrals may be suggested when appropriate.



10. Agreement Acknowledgment

By proceeding with services, the client acknowledges that they have read, understood, and agreed to the terms outlined in this Client Agreement & Scope Summary.

Client Name: _____

Date: _____

Signature (if applicable): _____