BUSINESS ADVISORY LAUNCH PROGRAMME · BUILD YOUR ENGAGEMENT TERMS AND CAP YOUR LIABILITY

Engagement terms checklist

The clauses an advisory engagement letter needs. A template to adapt, not legal advice.

01 The essentials

- [ ] Scope, and an explicit list of what is out of scope.
- [ ] Fees, payment terms, and intellectual property in what you produce.
- [ ] A mutual confidentiality clause (from Module 3), and termination.

02 The liability cap

Set the cap consistently with your PII cover.

- [ ] Total liability capped at the fees paid, or an agreed multiple.
- [ ] Indirect and consequential loss excluded.
- [ ] No attempt to exclude liability for fraud or death/personal injury by negligence.

03 The scope boundary

- [ ] A clear statement: this engagement does not include regulated financial, insolvency, legal or tax advice.
- [ ] A commitment to refer to a qualified professional where such advice is needed.
- [ ] Signed by both sides before any work begins.

PREFER THIS DONE FOR YOU?

Want the practice behind these terms, built right?

It's one of the things we build — hand it over and skip the DIY. · digitalroyalty.co.uk

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