



Letter of Engagement

Date: _____

Schooley Mitchell – Bay Area
6114 La Salle Avenue #304
Oakland, CA 94611

Name: _____ (the “Client”)

As a result of our discussion on _____, we are summarizing our understanding of the terms of our consulting engagement with the Client.

We, Schooley Mitchell, understand that the Client would like to engage the vendor optimization consulting services of Schooley Mitchell for the purpose of selecting and implementing certain vendor services prior to the launch of the Client’s dental practice.

Schooley Mitchell understands the scope of this engagement is specific to the following tasks:

1. Review Client business plan and gather specific vendor requirements.
2. Negotiate and secure up to three vendor quotes for each selected cost category.
3. Based on expected open date and vendor requirements, select a preferred vendor for each selected cost category.
4. Manage the implementation and deliver an *Implementation Verification Report (IVR)* documenting the successful set-up of each selected cost category.

We understand that the Client agrees to provide the following information to Schooley Mitchell for us to perform our vendor optimization consulting services.

Items include:

1. Select the specific cost categories to optimize (initial all that apply):
 - a. Merchant processing cost category: _____
 - b. Telecom/data cost category: _____
 - c. Waste cost category: _____
2. Complete our *Fact-Finding* questionnaire for each selected cost category.
3. Confirm pricing bundle (initial all that apply):
 - a. Optimize merchant processing **or** telecom/data: \$1,500 _____
 - b. Optimize merchant processing **and** telecom/data. \$2,500 _____
 - c. Optimize waste \$700 _____
4. Signed Letter of Engagement

Schooley Mitchell will invoice 25% of the fixed fee upon completion of the items listed above. A final invoice, for the remaining balance, will be issued when the Client approves the *Implementation Verification Report (IVR)*.

If the services outlined are in accordance with your requirements and if the above terms are acceptable to you, please sign this letter in the space provided below and return a copy to us.

Sincerely,

Adam D. Smith

Schooley Mitchell – Bay Area

The services and terms as set out above are as agreed.

Client Signature: _____

Date: _____