Advisory engagement scope

Stonebridge Advisory, a practice of Stonebridge Legacy Partners, Limited Partnership. One page. Nothing starts until both parties have signed it.

1. The question

In one or two sentences, the decision this work informs and who makes it.

> *Example: "Before the signing date, do the supplied reserves, production and economic exports for Asset X tie to one another and to the data room, and which material differences change the price?"*

2. Sources we will reconcile to

The documents, databases and models the deliverable will be traced back to. Nothing else is in scope.

SOURCE	OWNER	FORM	AVAILABLE BY

3. Deliverable

What you receive, in what form, and the standard it is held to.

- Form: memorandum / model review / redline / training module / data room note
- Standard: every figure and recommendation carries its source and its assumption
- Not included: (state explicitly, e.g. "this is not a reserves audit or certification under SEC or SPE definitions, and no engineering opinion is issued unless the applicable registration is held")

4. Timeline

MILESTONE	DATE
Sources received	
Interim read-out	
Draft deliverable	
Final deliverable	

5. Price and terms

- Fixed fee or day rate, and what triggers a change order
- Expenses
- Confidentiality: client and employer names are never published; references only with written consent
- Independence: any interest Stonebridge holds in the asset or counterparty is disclosed here

6. People

ROLE	NAME	RESPONSIBILITY
Client sponsor		Decision owner
Stonebridge lead		Deliverable and provenance
Reviewer		Independent read of the draft

7. Signatures

Client sponsor _____ Date _____

Stonebridge _____ Date _____

Provided as a template. Contact: contact@stonebridgeleg.com