ADVICE-ONLY™ SAMPLE EVIDENCE PACKET

Illustrative Completion and Payment Records

Fictional administrative exhibits relevant to scope completion, fee terms, and boundaries.

FICTIONAL TRAINING MATERIAL. All people, firms, dates, balances, and events are invented. This is not an official assessment, legal advice, or a guarantee of any finding.

E-04 — Invoice

Field	Entry
Invoice number	NFP-2026-0410
Issued	April 10, 2026
Bill to	Jordan and Riley Mercer
Description	One-time household financial plan
Fixed fee	$2,400.00
Due date	Within two calendar days after delivery
Contingency	No fee adjustment based on implementation, transfer, product, manager, or provider choice.

E-05 — Payment receipt

Field	Entry
Payment date	May 22, 2026
Payer	Jordan and Riley Mercer
Payee	Northline Financial Planning, LLC
Amount	$2,400.00
Method	Electronic bank transfer
Memo	Invoice NFP-2026-0410
Reviewer note	Payment followed delivery, but the obligation and amount were set in the signed agreement before planning began.

E-10 — Completion record

The May 20 delivery email identifies the final plan and assumptions schedule, states that agreed planning work is complete, and defines the remaining clarification window. The retained agreement describes the same deliverables and follow-up.

Boundary facts to corroborate

- No discretionary authority or account credentials were requested in this fictional engagement.
- No trading, account opening, transfer, product application, or execution record has been identified in the sample file.

- CRM export and firm attestation are available, but neither independently proves the absence of all activity.
- Evaluate later-service questions from the actual timeline and facts, not a fixed waiting period.