

Analyst-On-Retainer Plan

Compliance Standards' Analyst-on-Retainer plan is designed to give you flexible access to specialized analytical expertise—when and where you need it. Whether you're testing strategic ideas, researching industry changes, or evaluating competitive moves, our analyst time is available to support informed decision-making across your organization.

What You Get

- 5 hours/month of dedicated analyst time
Fee: \$1,500 per month
- Additional hours billed at \$250/hour
- Access for multiple authorized stakeholders from your organization

Typical Use Cases:

- Data-driven insights and on-demand analysis (when data is available)
- Research on competitors and market activity
- Insight into industry and buyer trends
- Validation of internal strategy proposals
- Targeted advisory sessions with management, sales, or marketing
- ITAD sector intelligence briefings
- Input on sustainability, AI integration, automation trends, and more

What to Keep in Mind

1. While our core research focuses on ITAD, we explore adjacent areas that directly impact ITAD performance:
 - AI, automation, and intelligent infrastructure
 - Product lifecycle and sustainability
 - Enterprise tech trends and secondary markets
 - Corporate risk, regulation, and leadership strategy

2. We recommend authorizing key stakeholders—not just the executive sponsor—to use the available hours. This ensures departments like sales, operations, ESG, or finance can directly benefit from our analysis.

Terms of Service

1. Fair Use & Scope:

Analyst-on-Retainer hours cover analysis, research, and direct consultations. Projects requiring structured reports, external interviews, primary surveys, or custom deliverables may fall under premium engagements and will be quoted separately if needed.

2. Hour Expiry & Engagement:

- Hours do not roll over month to month.
- If unused, we will proactively invite your team to a short monthly wrap-up call during the final week of the month. This briefing will include key findings from our ongoing research and serve as a platform for your team to ask questions or explore other topics.

3. Deliverables:

Unless otherwise specified, deliverables include email summaries, verbal briefings, or working notes—not full-format research reports unless bundled with other paid services.

4. Confidentiality & IP:

All consultations and documents are covered by mutual confidentiality. Any original IP produced remains the property of Compliance Standards LLC unless otherwise agreed in writing.

5. Term & Payment:

- 12-month minimum commitment.
- Billed monthly or quarterly in advance.
- Payment due upon receipt. Late fees may apply after 10 days.
- After first 12 months, contract can move to month-by-month basis

6. Termination Clause:

Either party may terminate the agreement with 30 days written notice after the first 12 months.

Why Choose This Model?

- No Overhead: Start with manageable access—no need to lock into full consulting projects right away.
- Cross-Functional Utility: Strategy, operations, sales, marketing, ESG, and executive teams can all benefit from time with an experienced industry analyst.
- Industry Focus: Since 2003, we have delivered ITAD-centric intelligence and market support unmatched by traditional consulting firms.

Go to Next Page for the Agreement & Acceptance Letter.

Analyst-on-Retainer Agreement

Between:

Client Name: _____

Company: _____

Email: _____

Phone: _____

And:

Compliance Standards LLC ("Consultant")

Scope of Engagement:

Consultant agrees to provide Analyst-on-Retainer services as outlined in the Service Overview above.

Term:

- 12 months minimum, starting on: _____
- After the initial 12 months, the agreement automatically renews on a month-to-month basis unless terminated with at least 30 days' written notice.
- Termination is not permitted during the initial 12-month term.

Monthly Retainer Fee:

\$1,500/month for up to 5 hours. Additional hours are billed at \$250/hour.

Invoicing & Payment Terms:

Invoices are due monthly, in advance. Payment is due within 10 days of invoice date.

Confidentiality:

Both parties agree to maintain confidentiality of shared materials, communications, and findings. Non-disclosure terms apply to all verbal and written communication unless otherwise waived.

Compliance Standards LLC

Boston/Miami

Intellectual Property:

Any original materials created by Compliance Standards under this agreement remain Compliance Standards' property unless agreed otherwise in writing.

Acceptance:

By signing below, Client agrees to the terms of this agreement.

Signature (Client): _____

Date: _____

Signature (Compliance Standards): _____

Date: _____