Compliance Standards LLC

Boston/Miami

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.

Section 1: What You Get

- 5 hours/month of dedicated analyst time
- Fee: As posted here
- Term: Per month, minimum commitment: six (6) months
- Additional hours billed at $300/hour
- Access for multiple authorized stakeholders from your organization

Section 2: Typical Use Cases:

- Data-driven insights and on-demand analysis (when data is available)
- Strategy vetting: Validation of internal strategy proposals
- 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
- Intelligence briefings
- Input on sustainability, AI integration, automation trends, and more

Section 3: What to Keep in Mind

1. Our research and consulting focus is on:
    - a ITAD
    - b Urban mining
    - c AI, automation, and intelligent infrastructure
    - d Product lifecycle and sustainability
    - e Enterprise tech trends and secondary markets
    - f Corporate risk & regulation
    - g 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.

Section 4. Terms of Service

1. Fair Use & Scope:

Analyst-on-Retainer hours cover analysis, research, and direct consultations for up to five hours per month. Projects may require 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:

- Six-month minimum commitment. For 12 months’ engagement, please ask for reduced cost.
- Billed monthly or quarterly in advance.
- Payment due upon receipt. Late fees may apply after 10 days.
- After first six months, contract can move to month-by-month basis

6. Termination Clause:

Client may terminate the agreement at any time with 30 days’ written notice, but fee payment obligations cannot be terminated. Clients are required to pay the duration of the country, whether the actual work is terminated.

Section 5. 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.

Compliance Standards LLC

Boston/Miami

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:

- Six (6) months minimum, starting on: ______________________
- After the initial six months, the agreement automatically renews on a month-to-month basis unless terminated with at least 30 days’ written notice.
- Termination is permitted during the initial six months term under the rules of Section 4, article 6 of this Engagement Contract.

Monthly Retainer Fee:

Please see here for latest fees. Additional hours are billed at $300/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.

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.

____

Client First and Last Name:

____

Title

____

Organization

____

Email

____

Phone Number

________________ _____________________________

Signature (Client)

____

Date

Section to be filled out by Compliance Standards' representative.

Signature (Compliance Standards): ________________________________

First and Last Name: ____

Title: ____

Email: ____

Date: ______________________