



WealthView

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INVOICE

DATE 08-01-2026
INVOICE # INV-2026-0142
CUSTOMER ID WV-8842
DUE DATE 08-16-2026

BILL TO

Jordan Ellis
Ellis & Co. Holdings
48 Harbor View Drive
Boston, MA 02110
Phone: 617-555-0177

No.	PRODUCT	DESCRIPTION	QTY	PRICE	AMOUNT
1	Advisory	Quarterly Portfolio Advisory Retainer	1	₹ 2,500.00	₹ 2,500.00
2	Consulting	Estate Planning Consultation (3 sessions)	3	₹ 300.00	₹ 900.00
3	Tax Review	Tax Strategy Review	1	₹ 450.00	₹ 450.00
4	Reporting	Investment Performance Report Preparation	1	₹ 150.00	₹ 150.00

Terms & Conditions

1. Total payment due within 15 days.
2. Please include the invoice number with your payment.
3. A late fee of 1.5% per month applies to overdue balances.

Subtotal	₹ 4,000.00
Discount	₹ 40.00
Tax amount	₹ 316.80
Tax due	
Other	-
TOTAL	₹ 4,276.80

Make all checks payable to
WealthView Advisors LLC

If you have any questions about this invoice, please contact
Alex Rivera, +1 212-555-0134, hello@wealthview.co.in

Thank You For Your Business!