Estate Planning
Fee Agreement

1.   Fee Structure

In order to maintain a logical, consistent, and fair pricing system, most estate planning projects I provide will qualify for a fixed fee arrangement. There are some situations when an hourly billing rate makes better sense, such as making relatively minor changes to an existing estate plan. However, based on our discussion, we have agreed to the following fixed fee:

$_____

2.   Payment Schedule

In order to proceed, you must supply a partial payment as evidence of your commitment to complete the project. The initial payment amount is determined as follows:

Total Fee	Initial Pmt.
$0 to $3,000	$500
$3,001 to $5,000	$1,000
$5,001 or more	$2,500

The balance is due upon delivery of the documents necessary to complete the project.

3.   Costs and Expenses

You are responsible for payment of any recording or filing fees necessary to complete the project.

4.   Engagement Letter

Pursuant to the Rules of Professional Conduct published by the State Bar of Arizona, this agreement is accompanied by an Engagement Letter that includes additional terms of our attorney-client relationship. If misplaced, you may find a copy on the law firm website.

5.   Change Orders

In some cases, the scope of a project will change prior to its completion. Therefore, the agreed-upon fixed fee may be revised without updating this agreement. However, any change that raises the fee must be pre-approved by you, although not necessarily in writing.

In the event you abandon the project prior to signing of the documents necessary to complete it, then your initial payment is non-refundable, but you will not be responsible for payment of the remaining balance.

6. Gratuities

I have 5 daughters who will someday expect me to pay for their weddings, so yes I would accept a gratuity for *extraordinary* service.

_____

Please confirm your desire to proceed by signing below:

_____ Date: _____
Signature

_____ Date: _____
Signature