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ESTATE PLANNING • INHERITANCE PROTECTION

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## **Estate Planning Fixed 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:

<u>Total Price</u>	<u>Initial Pmt.</u>
\$0 to \$2,500	\$400
\$2,501 to \$4,999	\$1,000
\$5,000 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.

### **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.

