

Law Offices of  
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ESTATE PLANNING • INHERITANCE PROTECTION

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## **Estate Planning Fixed Price Agreement**

### **1. Fixed Price Schedule**

In order to maintain a logical, consistent, and fair pricing system, all estate planning projects are priced according to a Fixed Price Schedule updated annually. Based on our discussion, we have agreed to the following fixed price:

\$ \_\_\_\_\_

### **2. Level of Service**

The Fixed Price Schedule includes two levels of service. Based on our discussion, we have agreed to the following level of service:

Standard \_\_\_\_\_

Premium \_\_\_\_\_

### **3. 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 \$2,295	\$300
\$2,296 to \$4,989	\$1,000
\$4,990 or more	\$2,500

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

### **4. Costs and Expenses**

You are responsible for payment of any filing, recording, and publication costs necessary to complete the project.

**5. Engagement Letter**

Pursuant to Arizona State Bar ethical rules, this agreement is accompanied by an Engagement Letter that includes additional terms of our attorney-client relationship.

**6. Change Orders**

In some cases the scope of a project will change prior to its completion. Therefore, the agreed-upon fixed price may be revised without updating this agreement. Any change to the scope of a project that increases the total price 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.

**7. Gratuities**

I have four daughters who will someday expect me to pay for their weddings, so yes, I will gladly accept gratuities for extraordinary service.

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Please confirm your desire to proceed by signing below:

\_\_\_\_\_  
*Signature*

Date: \_\_\_\_\_

\_\_\_\_\_  
*Signature*

Date: \_\_\_\_\_