

Law Offices of  
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ESTATE PLANNING • INHERITANCE PROTECTION

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## **Estate Settlement Fixed Price Agreement**

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

In order to maintain a logical, consistent, and fair pricing system, all estate settlement 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 three levels of service. Based on our discussion, we have agreed to the following level of service:

\_\_\_\_\_ Standard                      \_\_\_\_\_ Elite  
\_\_\_\_\_ 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 \$2,000	\$300
\$2,001 to \$5,000	\$1,000
\$5,001 or more	\$2,500

The balance is due four months after your appointment as personal representative or formal acceptance of duties as trustee (as the case may be). A final invoice will be provided approximately two months before the due date.

### **4. 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.

**5. Costs and Expenses**

You are responsible for payment of any filing, recording, and publication costs.

**6. Taxes and Accountings**

You are responsible for filing any necessary tax returns for the estate – income, estate, or others. If you need a referral to an accountant for this purpose, please let me know. I do not prepare tax returns.

**7. Engagement Letter**

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

**8. Gratuities**

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

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Please confirm your desire to proceed by signing below:

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

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