

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.

Please confirm your desire to proceed by signing below:

Signature

Date: _____