

Kenneth Barber & Associates, LLC

Attorneys at Law

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INITIAL CONSULTATION AGREEMENT

An initial consultation serves three basic purposes: 1) for the lawyer to determine whether he or she can represent the potential client, 2) for the lawyer and potential client to determine whether they want to work together, and 3) for the lawyer to explain how the representation will proceed if the potential client decides to retain the lawyer.

This Initial Consultation Agreement sets for the terms and conditions of the initial consultation meeting between **KENNETH BARBER & ASSOCIATES, LLC** ("Attorney," "we," or "us") and the undersigned perspective client(s) ("Client," or "you"):

1. Purpose of Initial Consultation. The purpose of the initial consultation is for us (a) to learn about you and your particular legal needs based on the information you provide; (b) to answer your questions to the best of our ability; (c) to identify your options and, to the extent possible, analyze the costs and benefits of those alternatives; (d) to help you determine your course of action, if any; (e) to discuss our fees and terms of representation if an ongoing attorney-client relationship is to be established after the meeting; and (f) to determine the next steps in the process, as appropriate; (g) to confirm there is no conflict of interest prior to proceeding.

2. Legal Services Agreement. Following the initial consultation, if you agree to retain us, and if we agree to provide services to you, we will prepare a separate, more detailed Legal Services Agreement to be executed by both parties. The Legal Services Fee Agreement will supersede this Initial Consultation Agreement and will set forth the terms and conditions of our representation of you, including our fees and the specific services to be performed by us. If there is no Legal Services Agreement executed, the attorney/client relationship ends at the conclusion of the initial consultation.

3. Confidentiality. All information and documents that you provide to us at the initial consultation shall remain strictly confidential, whether or not you decide to retain us to provide legal services, except as authorized by you or otherwise provided under the Connecticut Rules of Professional Conduct.

4. Reliance Limited. Because it may be impossible to fully assess a matter within the time frame allotted for the initial consultation or with the information or documents that you provide at the initial consultation, you should not rely upon any legal opinions provided by us during the initial consultation concerning any legal matter.

5. Limited Scope. The initial consultation is a limited scope service provided by us to help you determine whether you may want to retain us to provide legal services. At the conclusion of the initial consultation, there is no obligation for you to retain us, nor do we have an obligation to provide services to you, unless mutually agreed in writing.

6. Limitation on Time. The time for the initial consultation is limited to 60 minutes, excluding any time spent by us to prepare for the initial consultation.

KENNETH BARBER & ASSOCIATES, LLC

ATTORNEYS AT LAW

7. Fee for Initial Consultation. The fee for the initial consultation is **FOUR HUNDRED DOLLARS (\$400.00)**, which is non-refundable and must be paid in advance of the initial consultation. This fee is charged solely for the attorney's time, knowledge, and professional evaluation of your legal matter during the consultation. The consultation fee is **not credited, applied, or deducted from any future legal fees, retainers, flat fees, or invoices**, regardless of whether you choose to retain Kenneth Barber & Associates, LLC following the consultation.

For **Estate Planning clients only**, the fee for the initial consultation is **ONE HUNDRED DOLLARS (\$100.00)**, which is non-refundable and must be paid in advance of the consultation. If the client retains Kenneth Barber & Associates, LLC to prepare estate planning documents within sixty (60) days of the consultation, **the \$100.00 consultation fee will be credited toward the final cost of the estate planning documents**. This reduced consultation fee and credit apply exclusively to Estate Planning matters and does not apply to any other practice area.

By signing this document below, I agree to the terms and conditions set forth above concerning my initial consultation meeting.

CLIENT:

ATTORNEY:

SIGNATURE

Date

KENNETH BARBER
& ASSOCIATES, LLC

Date

PRINTED NAME

- ☐ Cash
- ☐ Check # _____
- ☐ Credit Card

KENNETH BARBER & ASSOCIATES, LLC

ATTORNEYS AT LAW

OPTIONS

____ (initial) I hereby authorize KENNETH BARBER & ASSOCIATES, LLC to charge the balance currently due on my account for the amount of \$_____.

____ (initial) I hereby authorize KENNETH BARBER & ASSOCIATES, LLC to charge the balance of my account automatically each month. Card will be charged the FIRST of the each month for prior month fees.

____ (initial) I choose to manually pay my account balance. Balance for legal services is due on the FIRST of each month. After the 15th of the month, balances are considered past due. After 30 days, account balances will automatically be charged to the card on file.

PAYMENT INFORMATION

Client Name: _____

Client Billing Address: _____

Type of Card: ☐  ☐  ☐ 

Card Number: _____

Expiration Date: _____ Security Code: _____

The undersigned guarantees performance of the financial provisions of this agreement.

Card Holder Name: _____

Signature of Card Holder: _____ Date: _____