

# HARRELL LAW

317 - 417 - 8638 AVONLAW.US

## SENT VIA SECURE CLIENT PORTAL ENGAGEMENT LETTER FOR ESTATE PLANNING

Dear Client:

I appreciated having the opportunity to meet with you during our **Consultation Appointment**. The following letter sets forth how our process works at Harrell Law, and the legal fees and other costs that will be charged.

The estate plan that we discussed in our meeting would normally include the drafting of the following documentation:

- Durable Power of Attorney for Finances
- Durable Power of Attorney for Healthcare
- Living Will Declaration for End-of-Life Decision Making
- Funeral Planning Declaration
- Last Will and Testament
- Personal Property Memorandum

The above is offered as a flat-fee package quoted at \$\_\_SAMPLE\_\_ including recording fees, as we prefer to spend whatever time is needed to work with you and your family to craft and implement your estate plan. For us, this is just the beginning. We want you to feel comfortable working with us for a lifetime. We strive to spend our time providing the highest-level service to our clients– it's what we love to do, and we take it seriously.

Your estate plan is subject to attorney/client privilege, which means that any information you discuss with us during this process will be kept confidential and private. We may not disclose your estate plan to family members or third parties, unless you give us written authorization to do so. We will ask that you sign a release to authorize Harrell Law LLC to discuss your estate plan with your tax and financial professionals as needed.

After your **Consultation Appointment**, we will now prepare your documents, which will take a few weeks. Once prepared, you will receive those drafts by email to review. We will then schedule a **Signing Appointment** to finalize your documentation. You may wish to have a family member present at your **Signing Appointment**, especially if they will serve as your Power-of-Attorney or as Executor of your Will. We are happy to include them if you wish.

Payment for your plan will be due at the time of signing. In addition, you will be billed for all advancements and charges on your behalf such as: recording fees, title search fees, land record research fees, etc. We also provide complimentary legacy reviews.

You retain your original documents, which we provide to you in your estate planning portfolio, and you also receive access to digital scans of your documents. Secure downloads are available to you and authorized family members through your **Clio for Clients** portal at no additional cost.

Harrell Law LLC will provide you with guidance on ensuring your plan is implemented. We will help you to transfer and retitle your real estate, personal property, and business holdings to facilitate your plan. However, to transfer financial accounts and stock holdings into the appropriate name or title to facilitate your estate plan often requires a little “homework” on your end. We are here to help you fill out and notarize change-of-beneficiary forms, etc., as well as answer follow-up questions and concerns you and your family members may have.

For future legal services, the attorney's hourly rate is presently Three Hundred and Fifty Dollars (\$350.00) per hour; and the paralegal's hourly rate is presently One Hundred and Twenty-Five Dollars (\$125.00) per hour. You agree to pay any balance due that is reflected on an invoice upon receipt. If you fail to pay any invoice in a timely manner or fail to make other payment arrangements acceptable to me, I will have the right to withdraw my appearance as your attorney (if applicable at the time) and cease providing services. If it becomes necessary for me to file legal proceedings to collect a balance due from you, you shall pay my reasonable attorney fees and costs incurred in connection with such proceedings, as well as interest on such balance as provided by law.

If you have any questions concerning any of the issues set out in this letter, please feel free to contact us by phone, email, or through your ***Clio for Clients*** portal. We look forward to working with you. Thank you for the opportunity to be of service to you and your family.

Sincerely,

Jamie E. Harrell  
HARRELL LAW LLC