

# Estate Planning Engagement Agreement

Client Name: \_\_\_\_\_

Thank you for retaining Carolina Family Estate Planning (“CFEP”)! We are looking forward to planning with you.

The Rules of Conduct governing attorneys recommend that attorneys enter into written fee agreements with every new Client. This document confirms that Carolina Family Estate Planning will provide legal services which will include preparation of your Estate Plan.

Please note that the following documents are incorporated into this agreement by reference:

- The CFEP Vision Clarifier, which explains in detail what your plan includes.
- Forward: the CFEP Client Welcome Booklet, which explains our general policies, including how our team works and how we treat client confidentiality and privacy

Due to State Bar attorney ethics rules and the possibility of future developments, we cannot guarantee a specific outcome in your matter. However, we do guarantee that the services we provide will be based upon current, settled legal issues and the highest ethical standards.

## Our Guarantee

**We promise you will receive competent legal services, to the best of our abilities. At any time between now and 60 days after delivery of your planning documents, if you are not completely satisfied with our services, we ask that you, 1) please tell us immediately, and 2) give us an opportunity to make it right. If we cannot make it right, we will refund 100% of your fee.**

## Fees

Plan: \_\_\_\_\_  Plan includes Funding Assistance

Other Services: \_\_\_\_\_ Fee: \_\_\_\_\_

50% of the fee is earned at the Design Meeting. We will collect this amount less any deposit at the beginning of your Design Meeting.

We will collect the remainder due at the beginning of your Signing Meeting. Please be aware that 40% of the entire fee is earned by drafting the plan. If you terminate the engagement prematurely, you will be invoiced for any remaining balance due.

By Signing this agreement, you waive your right of chargeback on credit card payments for this fee.

## Length of Engagement

This Agreement will continue in effect until either 1) 60 days after delivery of your planning documents; or 2) 60 days after delivery of your Asset Transfer Package if your plan includes Funding Assistance.

You may terminate this Agreement within the next 3 days for a full refund of your fee. However, once we begin designing the plan you agree to waive your right to cancel, even if it is within this 3-day window.

CFEP may terminate your representation for any of the following reasons:

- (1) non-payment of fees or expenses for work completed under this Agreement;
- (2) being excessively disrespectful or argumentative with any representative of CFEP;
- (3) failure to cooperate or engaging in conduct or making statements which render it unreasonably difficult for CFEP to carry out the terms of your engagement;
- (4) excessive cancellations: two or more cancelled appointments with less than one week’s notice.

By signing this Agreement, you agree to our representation of you under the terms proposed. If this is not acceptable to you, please do not sign the Agreement. You may also seek separate counsel if you so choose. If this arrangement is acceptable to you, please sign below.

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

By: \_\_\_\_\_  
Carolina Family Estate Planning

## Sign Here

Client: \_\_\_\_\_

Client: \_\_\_\_\_