

Estate Planning Service Agreement

Date: [Insert Date]

Client Name: [Client's Name]

Client Address: [Client's Address]

Dear [Client's Name],

We are pleased to confirm our agreement to provide estate planning services to you. This letter outlines the terms of our engagement and the scope of services that we will provide.

Scope of Services

- Consultation to assess your estate planning needs.
- Preparation of necessary legal documents, including wills, trusts, and powers of attorney.
- Review and update of existing estate planning documents.
- Guidance on tax implications and estate administration.

Fees

The fee for the estate planning services will be [insert fee structure], with an initial retainer of [insert retainer amount] due upon signing this agreement.

Confidentiality

We will maintain the confidentiality of all information shared during this process, in accordance with applicable laws and ethical guidelines.

By signing below, you agree to the terms outlined in this service agreement.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Contact Information]

Accepted and Agreed:

[Client's Signature] _____ Date: _____