

Comprehensive Estate Planning Proposal

Date: [Insert Date]

[Your Name]
[Your Address]
[City, State, Zip Code]
[Email Address]
[Phone Number]

[Client's Name]
[Client's Address]
[City, State, Zip Code]

Dear [Client's Name],

Thank you for considering us to assist you with your estate planning needs. This proposal outlines the comprehensive estate planning services we provide, tailored specifically for your situation.

Scope of Services

- Assessment of your current estate situation
- Preparation of wills and trusts
- Power of Attorney and Health Care Directives
- Tax planning strategies
- Regular reviews and updates of your estate plan

Proposed Timeline

We estimate the following timeline for the completion of your estate planning:

- Initial Consultation: [Date]
- Drafting Documents: [Date]
- Final Review and Execution: [Date]

Fees

The estimated fee for our comprehensive estate planning services is [Fee Amount]. This includes all consultations, document preparation, and follow-up services.

Next Steps

Please review this proposal and let us know if you have any questions or concerns. We look forward to the opportunity to work with you to secure your future.

Best regards,
[Your Name]
[Your Title]
[Your Company]