

Estate Planner Engagement Agreement

Date: _____

Client Name: _____

Address: _____

City, State, Zip: _____

Dear [Client Name],

This letter serves as an engagement agreement between you and [Estate Planner/Company Name], effective from the date signed below.

Scope of Services

As your estate planner, we will provide the following services:

- Consultation on estate planning needs
- Preparation of necessary documents (will, trust, etc.)
- Tax considerations and planning
- Support with asset distribution

Fees

The fees for our services will be as follows:

- Initial Consultation: \$_____
- Document Preparation: \$_____
- Hourly Rate: \$_____

Termination of Agreement

Either party may terminate this agreement with written notice.

We appreciate the opportunity to work with you on your estate planning needs. Please sign below to indicate your acceptance of this agreement.

Sincerely,

[Estate Planner Name]

[Company Name]

[Contact Information]

Client Signature: _____

Date: _____