

# ESTATE PLANNING CLIENT INFORMATION SHEET

Thank you for choosing *Miramonte Law, Inc.*

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

1. Time frame: we will make every effort to complete your work as quickly as possible. The estimated time in which you should receive your *drafted* documents from us is \_\_\_\_\_. If we are waiting on you or others for information this time may be longer. We do not begin work until we have a signed fee agreement, and the deposit is made.
2. The fee sheet sets forth the expected fees and costs. We start work when we receive the deposit unless otherwise agreed in writing. The balance is due at your document signing. We will not file anything with the court unless your account is current. As invoices are generated at the end of the month you may get an invoice for the balance due before you are scheduled to come in. If the fee sheet says you pay the balance when you come into sign, then you do not have to pay the balance from the invoice at that time. Any matter not listed on the fee sheet is not being handled by us. Multiple changes to your documents may result in additional fees.
3. If you have questions or want to check the status of your case, please email or call and you will be directed to the paralegal handling your matter. Our office works on everything as a team. We do not discuss the matter with non-clients such as other family members unless we have been specifically directed to do so and have agreed to do so. (Consultations with others may result in additional fees.)
4. Document Drafts: You are responsible for proofreading everything we draft, including spellings of names. Once a document has been signed, we are not responsible for the costs of any changes. Costs for corrections will be assessed to the client.
5. If we send document drafts to you, have made attempts to contact you, and have not heard back from you within 60 days, we will close your file with no refund and will not return any documents you have left with us.
6. Powers of attorney and other documents requiring signatures from others must be signed and returned within 30 days. If we do not receive them back within 30 days, or the documents are signed incorrectly, we will send the documents to you without those signatures. We will not contact your power of attorney agent to sign more than once.
7. File Retention Policy. At the completion of our service, we will send you originals and copies of your documents. Once our file is closed, we only keep scanned copies unless otherwise requested. If additional copies of your documents are needed, we will advise you of the cost.

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Signature

\_\_\_\_\_  
Signature