

SUCCESSION CLIENT INFORMATION SHEET

Thank you for choosing *Miramón 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 or heirs unless we have been specifically directed to do so and have agreed to do so. (Consultations with others may result in additional fees.)
4. Miramon Law, Inc. has not performed a title check, verified the accuracy of any property descriptions, or verified the accuracy of any information on any property owned, inherited, or donated by (or to) me.
5. Document Drafts: You are responsible for proofreading everything we draft, including spellings of names, VIN numbers, and legal descriptions. Once a document has been filed or signed, we are not responsible for the costs of any changes. Costs for corrections and filings will be assessed to the client.
6. 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.
7. In a succession matter, you should take care of any asset transfers within 90 days of receiving the Judgment of Possession. This includes transfers of vehicles, trailers, boats, bank accounts, and investments. You should also verify the transfer of any homestead exemption within that 90 day period. If you do not make the necessary transfers, there will be additional charges for obtaining recertified documents.
8. 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.

Signature

Signature