



Estate Planning Client Information Sheet

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 2 – 3 weeks. If we are waiting for information from you or others, this time may be longer.
2. **Fee Agreements:** The fee sheet sets forth the expected fees and costs. We do not begin work until we have a signed fee agreement, and a deposit has been made. The balance is due at your signing appointment. You may get an automatically generated invoice for the balance due before you come in to sign. Unless otherwise agreed upon, your balance is due at the signing appointment.
 - Multiple changes to your documents and consultations with the attorney may result in additional fees.
3. **Questions:** If you have questions or want to check the status of your case, please email, or call our office. If the paralegal working on your case is unavailable, we will have them return your call within 24 hours. Our office works on everything as a team. We do not discuss the matter with nonclients such as other family members. If necessary, a phone conference with the attorney can be arranged.
4. **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.
 - 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.
5. **Signatories:** Powers of attorney and other documents requiring signatures from others must be signed and returned **within 30 days**, or if the documents are signed incorrectly, we will send the documents to you without those signatures. We will not contact your signatory to sign more than once.
6. **File Retention Policy:** At the completion of our service, we will send you the originals 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 costs. I acknowledge I have been advised of the above and agree to the conditions set forth.

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Signature

Date

Signature

Date