

ESTATE PLANNING REPRESENTATION AND FEE AGREEMENT

Will Plans

<u>Initial(s)</u>		<u>Fees</u>
_____	Will Plans with Outright Gifts to Beneficiaries.....	\$2,000
_____	Will Plans with Trusts for Beneficiaries.....	\$2,400
_____	Will Plans with Transfer Tax Planning	\$4,200

Your Will Plan Includes:

- | | |
|--|---|
| <ol style="list-style-type: none"> 1. One Initial Consultation 2. One In-Person Meeting to Review First Drafts 3. One Revision of First Drafts 4. One Signing Ceremony 5. Wills | <ol style="list-style-type: none"> 6. Durable Powers of Attorney for Property 7. Powers of Attorney for Health Care 8. Living Wills 9. Estate Plan Portfolio Binder 10. Second Set of Original Documents |
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Revocable Living Trust Plans

<u>Initial(s)</u>		<u>Fees</u>
_____	Revocable Living Trust Plans with Outright Gifts to Beneficiaries	\$3,200
_____	Revocable Living Trust Plans with Trusts for Beneficiaries	\$3,600
_____	Revocable Living Trust Plans with Transfer Tax Planning	\$5,400

Your Trust Plan Includes:

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|---|---|
| <ol style="list-style-type: none"> 1. One Initial Consultation 2. One In-Person Meeting to Review First Drafts 3. One Revision of First Drafts 4. One Signing Ceremony 5. Revocable Living Trusts 6. Pour-Over Wills 7. Durable Powers of Attorney for Property 8. Powers of Attorney for Health Care | <ol style="list-style-type: none"> 9. Living Wills 10. Bills of Sale 11. Directions for Tangible Personal Property 12. Trust Funding Instructions 13. Sample Trust Fund Letters 14. Deed (1) (non-Chicago) (\$300 per additional deed) 15. Recording of Deed (county recorder’s fee extra) 16. Second Set of Original Documents |
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Asset Protection Plans

Asset protection plans are appropriate for clients who want to structure their estate plan to include asset protection tools. You should know that a standard revocable living trust provides NO asset protection, unlike the comprehensive asset protection plans offered below.

<u>Initial(s)</u>		<u>Fees</u>
_____	Domestic Law Asset Protection Plans	\$17,695
_____	Foreign Law Asset Protection Plans	\$19,695

Your Asset Protection Plan Includes:

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|---|--|
| 1. One Initial Consultation | 11. Living Wills |
| 2. One In-Person Meeting to Review First Drafts | 12. Bills of Sale |
| 3. One Revision of First Drafts | 13. Directions for Tangible Personal Property |
| 4. One Signing Ceremony | 14. Trust Funding Instructions |
| 5. Asset Protection Trusts | 15. Sample Trust Funding Letters |
| 6. Limited Liability Company | 16. Deed (1) (non-Chicago) (\$300 per additional deed) |
| 7. Revocable Living Trusts | 17. Recording of Deed (county recorder's fee extra) |
| 8. Pour-Over Wills | 18. Estate Plan Portfolio Binder |
| 9. Durable Powers of Attorney for Property | 19. Second Set of Original Documents |
| 10. Powers of Attorney for Health Care | |

Additional/Other Services

<u>Initial(s)</u>	<u>Description</u>	<u>Fee</u>
_____	_____	\$ _____
_____	_____	\$ _____

Total Fee

Total Fee for Services Approved by Clients \$ _____

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Terms of Representation

Clients must deposit the entire fee into PSS LAW (PSS) Client Trust Account before legal services begin. Please make your check payable to Sylvester Law Firm Client Trust Acct. One-half (1/2) of the total fee is considered earned and due upon mailing the first drafts to you. The balance is considered earned and due the earlier of the formal signing meeting or 14 days from mailing the first drafts to you. At those two stages, PSS's fee will be transferred from PSS's Client Trust Account into PSS's law firm operating account as earned, non-refundable fees. By signing below, you specifically agree, in advance, to both withdrawals from PSS's Client Trust Account.

You agree that you will not delay (1) reviewing your first drafts, (2) providing PSS necessary information, and/or (3) scheduling a formal signing of your estate planning documents. You agree that PSS's responsibilities under this Agreement shall terminate upon six calendar months from the date of its signing. If you choose to delay (1) reviewing your first drafts, (2) providing PSS necessary information, and/or (3) scheduling a signing meeting, any of which delay the completion of your estate planning beyond six months from the date of this Agreement, a newly signed and dated Agreement will be required, and an additional fee equal to at least one-third of the total fee stated above will be due and owing before PSS returns to working on your estate plans. This extra fee is meant to appropriately compensate PSS for the extra time spent on your matter. It is in your best interest to be diligent in working towards the completion of your estate plans. Please do not procrastinate after we start the estate planning process.

Couples

It is common for a couple to employ the same attorney to assist them in planning their estates. You have taken this approach by asking PSS to represent both of you, collectively. Accordingly, matters that one of you might discuss with PSS cannot be withheld and may be disclosed to the other. Ethical considerations prohibit PSS from agreeing with either of you to withhold information from the other. In this representation, PSS will not give legal advice to either of you or make any changes in any of your estate planning documents without your mutual knowledge and consent.

If a conflict of interest arises between the two of you during your planning or if the two of you have a difference of opinion, PSS can point out the pros and cons of your respective positions or differing opinions. However, ethical considerations prohibit PSS, as the attorney for both of you, from advocating one of your positions over the other. Furthermore, PSS would not be able to advocate one of your positions versus the other if there is a dispute at any time as to your respective property rights or interests or as to other legal issues between you. If actual conflicts of interest do arise between you of such a nature that in PSS's judgment it is impossible for PSS to perform its ethical obligations to both of you, it would become necessary for PSS to withdraw as your attorney.

Approval of Fee and Terms of Representation

The undersigned confirm that they understand and agree to the fee(s) stated above, billing procedure, and terms of representation.

Client's Signature

Date

Client's Signature

Date

PSS Law

Date