

ESTATE PLANNING REPRESENTATION AND FEE AGREEMENT

Will Plans

<u>Initial</u>		<u>Fees</u>
_____	Will Plan with Outright Gifts to Beneficiaries	\$1,700
_____	Will Plan with Trusts for Beneficiaries	\$2,100
_____	Will Plan with Transfer Tax Planning.....	\$3,900

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. Will | <ol style="list-style-type: none"> 6. Durable Power of Attorney for Property 7. Power of Attorney for Health Care 8. Living Will 9. Estate Plan Portfolio Binder 10. Second Set of Original Documents |
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Revocable Living Trust Plans

<u>Initial</u>		<u>Fees</u>
_____	Revocable Living Trust Plan with Outright Gifts to Beneficiaries.....	\$2,900
_____	Revocable Living Trust Plan with Trusts for Beneficiaries.....	\$3,300
_____	Revocable Living Trust Plan with Transfer Tax Planning	\$5,100

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 Trust 6. Pour-Over Will 7. Durable Power of Attorney for Property 8. Power of Attorney for Health Care | <ol style="list-style-type: none"> 9. Living Will 10. Bill of Sale 11. Directions for Tangible Personal Property 12. Trust Funding Instructions 13. Sample Trust Fund Letter 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</u>		<u>Fees</u>
_____	Domestic Law Asset Protection Plan.....	\$14,695
_____	Foreign Law Asset Protection Plan.....	\$16,695

Your Asset Protection Plan Includes:

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|---|--|
| 1. One Initial Consultation | 11. Living Will |
| 2. One In-Person Meeting to Review First Drafts | 12. Bill 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 Trust | 15. Sample Trust Funding Letter |
| 6. Limited Liability Company | 16. Deed (1) (non-Chicago) (\$300 per additional deed) |
| 7. Revocable Living Trust | 17. Recording of Deed (county recorder's fee extra) |
| 8. Pour-Over Will | 18. Estate Plan Portfolio Binder |
| 9. Durable Power of Attorney for Property | 19. Second Set of Original Documents |
| 10. Power 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 Client \$ _____

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Terms of Representation

Client 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 plan. 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 plan. Please do not procrastinate after we start the estate planning process.

Approval of Fee and Terms of Representation

The undersigned confirms that he/she understands and agrees to the fee(s) stated above, billing procedure, and terms of representation.

Client's Signature

Date

PSS Law

Date