

Law Offices of  
**Thomas J Bouman** PLLC

ESTATE PLANNING • INHERITANCE PROTECTION

7650 E. BROADWAY BLVD. #108  
TUCSON, AZ 85710

PHONE (520) 546-3558  
TOM@TOMBOUMANLAW.COM

## **Estate Planning Fee Agreement**

### **1. Fee Structure**

In order to maintain a logical, consistent, and fair pricing system, I will agree to establish a fixed fee arrangement for most estate planning matters. There are some situations when an hourly billing rate makes better sense, such as making minor changes to an existing estate plan. However, based on our discussion, we have agreed to the following fixed fee:

\$ \_\_\_\_\_

### **2. Payment Schedule**

To proceed you must supply a partial payment as evidence of your commitment to move forward with the agreed-upon matter. The initial payment amount is determined as follows:

<u>Total Fee</u>	<u>Initial Pmt.</u>
\$0 to \$2,500	\$500
\$2,501 to \$10,000	\$1,000
\$10,001 or higher	\$2,500

The balance is due upon delivery of the documents necessary to complete the matter.

### **3. Costs and Expenses**

You are responsible for payment of any recording or filing fees necessary to complete the agreed-upon matter. For example, an additional \$35 will be added to your fixed fee when I need to record a deed for you in Arizona.

### **4. Engagement Letter**

Pursuant to the Rules of Professional Conduct published by the State Bar of Arizona, this agreement is accompanied by an Engagement Letter that includes additional terms of our attorney-client relationship. If misplaced, you can find a copy on the law firm website.

### **5. Change Orders**

In some cases, the scope of an agreed-upon matter will change prior to its completion. Therefore, the agreed-upon fixed fee may be revised without updating this agreement. However, any change that raises the fee must be pre-approved by you, although not necessarily in writing.

In the event you abandon the agreed-upon matter prior to signing of the documents necessary to complete it, then your initial payment is non-refundable, but you will not be responsible for payment of the remaining balance.

**6. Optional Products and Services**

You may be given the opportunity to purchase an ancillary product or service related to your estate plan. However, these offers are entirely optional, and you are under no obligation to purchase any of them.

---

Please confirm your desire to proceed by signing below:

\_\_\_\_\_ Date: \_\_\_\_\_  
*Signature*

\_\_\_\_\_ Date: \_\_\_\_\_  
*Signature*