

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Engagement for Estate Planning Services

Dear [Client Name],

This letter confirms that [Law Firm Name] has been retained to provide estate planning services to you. These services may include the preparation of a Last Will and Testament, Trust agreements, Powers of Attorney, and related documents.

Evergreen Retainer

To begin work, we require an initial evergreen retainer in the amount of \$[Amount]. This amount will be deposited into our client trust account. We will apply our monthly fees and expenses against this retainer.

As a condition of our continued representation, you agree to replenish the trust account whenever the balance falls below \$[Minimum Threshold Amount]. We will provide you with a monthly statement showing the services performed and the current balance of your retainer. If the retainer is not replenished within [Number] days of a request, we reserve the right to suspend work or withdraw from representation.

Fees and Billing

Our fees are based on the time spent by attorneys and staff at their respective hourly rates:

- Partners: \$[Rate]/hour
- Associates: \$[Rate]/hour
- Paralegals: \$[Rate]/hour

Termination

You may terminate this engagement at any time. Upon termination, any unused portion of the retainer remaining in the trust account after payment of all outstanding fees and costs will be refunded to you.

Please sign and return a copy of this letter along with your initial retainer payment to signify your agreement to these terms.

Sincerely,

[Attorney Signature]
[Attorney Name]
[Law Firm Name]

Client Agreement:

I have read, understand, and agree to the terms set forth in this engagement letter.

[Client Signature]

Date: _____