

[Law Firm Name]
[Address]
[City, State, Zip Code]

[Date]

[Client Name 1]
[Client Name 2]
[Address]
[City, State, Zip Code]

Re: Engagement for Joint Estate Planning Services

Dear [Client Name 1] and [Client Name 2],

Thank you for choosing [Law Firm Name] to assist you with your estate planning. This letter confirms the terms of our representation of both of you.

1. Scope of Services

We will provide legal services to develop a comprehensive estate plan, which may include the preparation of Wills, Trusts, Powers of Attorney, and Healthcare Directives. Our services end upon the delivery and execution of these documents.

2. Joint Representation and Conflicts of Interest

We will be representing both of you jointly. This means we must act in the best interests of both parties. At this time, we do not believe there is a conflict of interest. However, if a dispute arises between the two of you that creates a conflict, we may be forced to withdraw from representing either of you.

3. Confidentiality and Information Sharing

In a joint representation, there is no "attorney-client privilege" between the two of you. Any information provided to us by one spouse may be shared with the other spouse. We cannot keep secrets from one another regarding your estate planning matters.

4. Fees and Costs

Our fee for these services will be [Flat Fee Amount or Hourly Rate]. In addition to our fees, you agree to reimburse us for out-of-pocket expenses such as filing fees or courier costs. An initial retainer of [Retainer Amount] is required before we begin work.

5. Termination

Either party may terminate this representation at any time by providing written notice. Upon termination, you will be responsible for fees earned and costs incurred up to the date of termination.

Please sign below to indicate your agreement with these terms.

Sincerely,

[Attorney Name]

[Law Firm Name]

Acknowledgment and Consent

We have read this letter, understand its contents, and consent to the joint representation under these terms.

[Client Name 1] Date: _____

[Client Name 2] Date: _____