

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Engagement for Fiduciary Representation Services

Dear [Client Name],

This letter confirms the terms and conditions under which [Firm Name] ("we" or "the Firm") will provide fiduciary representation services to you regarding [Description of Estate, Trust, or Legal Matter].

1. Scope of Services

The Firm will represent you in your capacity as [Executor/Trustee/Guardian/Agent] for [Name of Estate or Trust]. Our services will include, but are not limited to:

- Advising on legal duties and fiduciary obligations.
- Assisting with the marshaling and valuation of assets.
- Preparing and filing required legal documents and accountings.
- Representing you in communications with beneficiaries and creditors.

2. Fiduciary Duties

As a fiduciary, you owe a high duty of loyalty and care to the beneficiaries. Our role is to advise you on how to discharge these duties lawfully. Please note that our client is you, in your fiduciary capacity, and not the individual beneficiaries of the [Estate/Trust].

3. Fees and Billing

Our professional fees will be based on [Hourly Rates / A Flat Fee of \$ _____ / Statutory Commissions]. In addition to fees, you will be responsible for out-of-pocket expenses such as court filing fees, appraisal costs, and postage. Invoices will be sent [Monthly/Quarterly] and are due upon receipt.

4. Retainer

We require an initial retainer of \$[Amount] before work commences. This amount will be held in our trust account and applied against future billings.

5. Term and Termination

Either party may terminate this representation at any time by providing written notice. Upon termination, all earned fees and outstanding expenses remain due and payable.

6. Confidentiality

We will maintain the confidentiality of all information related to this representation in accordance with the rules of professional conduct.

If these terms are acceptable, please sign and return a copy of this letter.

Sincerely,

[Name of Attorney/Representative]

[Firm Name]

Acknowledgment and Acceptance:

I have read, understood, and agree to the terms set forth in this Engagement Letter.

[Client Signature]

Date: _____