

[Date]

[Beneficiary Name]

[Address]

[City, State, Zip Code]

Re: Engagement for Legal Representation - Estate/Trust of [Name of Deceased/Trust]

Dear [Beneficiary Name],

This letter confirms that [Law Firm Name] has been retained to represent you in your capacity as a beneficiary of the [Estate/Trust Name]. This document outlines the terms and scope of our legal services.

1. Scope of Representation

Our representation is limited to protecting your interests as a beneficiary. This includes:

- Reviewing accountings and distribution schedules.
- Communicating with the Executor/Trustee and their counsel.
- Ensuring compliance with the terms of the [Will/Trust Agreement].
- Advising you on your rights and obligations under applicable law.

2. Fees and Billing

Our legal fees will be charged based on [Hourly Rate / Flat Fee / Contingency]. Current hourly rates are \$[Amount] for partners and \$[Amount] for associates. Invoices will be sent [Monthly/Quarterly] and are due upon receipt.

3. Costs and Expenses

In addition to legal fees, you will be responsible for out-of-pocket expenses such as court filing fees, postage, travel, and photocopying costs.

4. Communication

We will keep you informed of significant developments. You agree to provide us with all necessary information and documents in a timely manner to ensure effective representation.

5. Termination

You may terminate this engagement at any time upon written notice. We may withdraw from representation as permitted or required by the rules of professional conduct.

6. Conflict of Interest

We represent only you in this matter. We do not represent the Fiduciary (Executor/Trustee) or any other beneficiaries of the estate or trust.

Please sign and return a copy of this letter to indicate your acceptance of these terms.

Sincerely,

[Attorney Name]
[Law Firm Name]

Client Acceptance:

I have read, understood, and agree to the terms set forth above.

Signature: _____ Date: _____