

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

RE: Retainer Deposit and Trust Account Requirements

Dear [Client Name],

This letter outlines the requirements regarding your retainer deposit and the handling of funds in our attorney trust account.

1. Initial Retainer Deposit

To begin legal representation, we require an initial deposit of \$[Amount]. These funds must be received by our office no later than [Date]. We will not commence work on your matter until this deposit has been cleared.

2. Trust Account Maintenance

Your deposit will be held in a segregated Client Trust Account (IOLTA). These funds remain your property until they are earned by the firm or applied to costs incurred on your behalf. You will receive monthly statements detailing all disbursements made from this account.

3. Replenishment Provision (Evergreen Retainer)

You agree to maintain a minimum balance of \$[Minimum Amount] in your trust account at all times. If the balance falls below this amount due to monthly billing, you agree to replenish the account to the original deposit level within [Number] days of receiving an invoice.

4. Application of Funds

The firm is authorized to withdraw funds from the trust account to pay for legal fees earned and out-of-pocket expenses incurred (such as filing fees, travel, or expert testimony) as they become due.

5. Refund of Unused Funds

Upon the conclusion of our legal services and the payment of all outstanding invoices, any remaining balance in the trust account will be refunded to you within [Number] business days.

Please sign below to acknowledge your agreement to these financial terms.

Sincerely,

[Attorney Name]

[Law Firm Name]

Client Acknowledgement:

I have read and understand the retainer and trust account provisions outlined above.

Signature: _____ Date: _____