

[Law Firm Name]  
[Address]  
[City, State, Zip Code]  
[Phone Number]  
[Email Address]

[Date]

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

RE: Letter of Intent - Legal Representation for Special Needs Trust and Guardianship

Dear [Client Name],

This Letter of Intent ("Letter") outlines the preliminary terms under which [Law Firm Name] ("the Firm") will provide legal services to [Client Name] ("the Client") regarding the establishment of a Special Needs Trust and the petition for Guardianship for [Beneficiary/Ward Name].

### **1. Scope of Services**

The Firm agrees to perform the following services:

- Drafting and execution of a [First-Party/Third-Party] Special Needs Trust.
- Preparation and filing of a Petition for Guardianship with the [County Name] Probate Court.
- Representation at the initial guardianship hearing.
- Coordination with financial institutions for trust funding.

### **2. Information Required**

The Client agrees to provide all necessary documentation, including medical evaluations (Clinical Team Reports), financial statements of the beneficiary, and identification for proposed guardians and trustees.

### **3. Fees and Costs**

[Option A: Flat Fee] The total fee for these services is estimated at \$[Amount].

[Option B: Hourly] Services will be billed at an hourly rate of \$[Amount] per hour.

The Client is responsible for all court filing fees and costs associated with background checks or medical evaluations.

### **4. Retainer**

A formal Engagement Agreement will follow this Letter. A retainer in the amount of \$[Amount] will be required prior to the commencement of work.

**5. Non-Binding Nature**

This Letter serves as a statement of intent and does not constitute a formal contract for legal representation. Representation begins only upon the signing of a formal Engagement Agreement and payment of the retainer.

Please sign below to acknowledge your intent to proceed based on these preliminary terms.

Sincerely,

[Attorney Name]  
[Law Firm Name]

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**Acknowledgment:**

I, [Client Name], agree to the terms outlined in this Letter of Intent.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_