

[Date]

[Client Name 1]

[Client Name 2]

[Address]

[City, State, Zip Code]

RE: Engagement for Joint Estate Planning Services and Waiver of Conflict of Interest

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 that you have asked us to represent both of you jointly in the preparation of your wills, trusts, and related documents.

Joint Representation and Potential Conflicts

Under the Rules of Professional Conduct, an attorney usually represents only one client in a matter to ensure undivided loyalty. Representing both spouses is common, but it can present a conflict of interest if your objectives or interests differ regarding the distribution of your assets.

By signing this letter, you acknowledge and agree to the following:

- **Shared Information:** In a joint representation, there is no expectation of confidentiality between the two of you. Anything one of you tells us regarding your estate plan may be shared with the other spouse.
- **Common Goals:** You believe your estate planning goals are currently aligned. If a serious disagreement arises where we cannot effectively represent both of you, we may be required to withdraw from representing both parties.
- **Independent Counsel:** You understand that you have the right to hire separate, independent legal counsel at any time to represent your individual interests.

Scope of Services

Our services will include [List specific documents, e.g., Last Will and Testament, Revocable Living Trust, Power of Attorney]. Our fee for these services is [Insert Fee Arrangement].

Consent and Waiver

If you wish to proceed with this joint representation, please sign and return this letter to indicate that you waive any potential conflict of interest and authorize us to share information freely between the two of you.

Sincerely,

[Attorney Name]
[Law Firm Name]

ACKNOWLEDGED AND AGREED:

[Client Name 1] Date: [Date]

[Client Name 2] Date: [Date]