

Template — Estate Planning Engagement Letter

Matter: Estate of Henderson — Estate Planning and Trust Package | Sensitivity: PUBLIC | Allowed roles: partner,

Scope

Preparation of will, revocable living trust (if selected), power of attorney, and healthcare directive; limited tax planning unless separately engaged.

Fees

Flat fee structure with staged payments; filing fees excluded.

Confidentiality

All client communications are confidential and protected to the extent permitted by law.