

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Engagement for High-Net-Worth Estate Planning Services

Dear [Client Name],

Thank you for choosing [Firm Name] to assist with your comprehensive estate planning. This letter outlines the scope of our advisory services and the terms of our engagement.

1. Scope of Services

Our firm will provide strategic counsel regarding the preservation and transfer of your wealth. This includes:

- Review of current asset structures and liability protections.
- Design of sophisticated trust vehicles (e.g., SLATs, GRATs, QPRTs, or ILITs).
- Tax planning to minimize federal estate, gift, and generation-skipping transfer (GST) taxes.
- Business succession planning and philanthropic strategy development.
- Preparation of core documents: Wills, Revocable Living Trusts, and Powers of Attorney.

2. Client Responsibilities

To provide effective advice, you agree to provide full and accurate disclosure of all financial assets, business interests, and family circumstances. We rely on the information provided by your family office, accountants, and other financial advisors.

3. Fees and Billing

Our services will be billed based on [Fixed Fee / Hourly Rate of \$XXX]. Any external filing fees or third-party appraisal costs will be billed separately. An initial retainer of \$[Amount] is required to commence work.

4. Confidentiality

All information shared during this engagement will be kept strictly confidential under attorney-client privilege, subject to applicable legal and ethical rules.

5. Conflict of Interest

[Standard disclosure regarding joint representation of spouses or business partners if applicable].

Please sign below to indicate your acceptance of these terms.

Sincerely,

[Advisor Name]
[Firm Name]

Acknowledgment and Acceptance:

[Client Signature]

[Date]