# **STRATEGY SESSION ENGAGEMENT LETTER**

DATE, 2021

Dear CLIENT,

Welcome to our law firm. We are pleased you have chosen us to assist you with such an important legal matter. In representing you, our primary goal is to make sure that you are well taken care of and you have a positive experience with us.

You are retaining our firm for a 60-minute [NAME] Strategy Session. Please note that a further agreement is necessary before we can represent you or your business in this matter beyond the strategy session or assist you with any other legal issues.

Not knowing whether your Estate Plan will protect you, your family, and all of your property can be nerve wracking. But don’t worry… we are going to help you with this! Before your strategy session your attorney is going to:



1. Review all of your Estate Planning Documents. Are they still up to date with current law? How well was it prepared? Will it actually accomplish what you are wanting?
2. Pull Title and review all of your real property to make sure it is properly titled in the name of your Living Trust.
3. Review all of your provided financial statements (bank accounts, IRAs, 401(k)s, and investment accounts). We will determine whether they are handled properly.

**Did you know even a simple bank account if not properly placed into your Living Trust can be stuck in court for over one year after the unexpected?**

During your meeting with your attorney, we will inform you what weaknesses and issues we see with your current plan and propose various solutions to address our concerns.

After our meeting we will give you a written summary of our evaluation for your records so you can go through this after our meeting regardless of whether you retain our firm to implement our strategies.

The total cost for this strategy session is $[VALUE] and is payable upon your signing of this agreement and prior to your scheduled session. Should our representation of you continue beyond the strategy session, a further agreement outlining the terms and conditions of that engagement will be necessary. You agree that should you not sign a further agreement after the strategy session, this engagement will be terminated, and we will be relieved of any and all obligations to you.

Nothing in this Agreement and nothing in our statements to you will be construed as a promise or guarantee about the outcome of the matter. We have made no such promise or guarantee. Our comments about the outcome of the matter are expressions of opinion only, are neither promises nor guarantees, and will not be construed as promises or guarantees.

Accepted and agreed to on \_\_\_\_\_\_\_\_\_\_\_\_\_, 2021

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ATTORNEY CLIENT