

Michael Kurak, P.C.
ATTORNEY AT LAW

Green Brook Office Centre
314 Route 22 West, Suite F • Green Brook, NJ 08812
TEL 732-752-1800
FAX 732-752-3967
E-MAIL: mike@mkurak.com
www.mkurak.com

PERSONAL & CONFIDENTIAL

Re: Initial Estate Planning Meeting

Dear Prospective Client(s):

I realize that you have many law firms from which to choose, so I would like to take this opportunity to thank you for granting me the privilege of serving you.

To introduce you to my firm and the planning process, I have enclosed this letter and the following items:

1. New Client Form;
2. Agenda;
3. Estate Planning Questionnaire; and
4. Sample Retainer Agreement Form.

My firm provides the quality of work of a large law firm with the personal attention of a small firm. To gather some basic information about you, please complete the New Client Form.

You are probably wondering about the details of the estate planning process and my role in it. Presently, you have expressed some concerns that you have about your Will, estate plan, and their tax consequences. During the initial meeting, I will present you with options to address your concerns so that you can make an informed decision.

However, to avoid my being presumptuous, I ask that you complete the agenda to include specific issues that you would like addressed during our session. By so doing, this meeting becomes more about what you want, than what I think is best for you. This meeting should last between 1 and 1 ½ hours.

The Estate Planning Questionnaire that I have enclosed raises some generic questions that we will discuss in more detail at our meeting. In addition, it helps organize some information about your family, your assets, and you that are necessary to design an appropriate estate plan and Will for your family.

By the end of our meeting, we will have set forth a course of action, at which time I will be

Page 2

able to estimate the legal fees for the completion of the project. The Retainer Agreement will be used to reflect our arrangement to proceed.

Generally, the planning process includes two meetings: At the first meeting we will review your existing financial situation and estate planning documents, if any. In addition to the enclosed questionnaire, please bring copies of any existing Wills, Trusts, Powers of Attorney and Living Wills. After this meeting, I will prepare drafts of the new documents for your review. Upon your review, we will meet to finalize and sign the documents. If possible, all questions and open items should be addressed before the second meeting to reduce the need and cost of a third meeting. In order to help move this process along, at our first meeting, please come prepared with a few open dates within six to eight weeks of our initial meeting to use for scheduling our final meeting.

I trust that this package provides you with a little more information about what to expect. I look forward to meeting you and thank you again for providing me with this opportunity to serve you.

If you have any questions in the meantime, please do not hesitate to call me.

Very truly yours,



Michael Kurak
MK:cmn

Attachments

MICHAEL KURAK, P.C.

314 ROUTE 22 WEST, SUITE F • GREEN BROOK, NEW JERSEY 08812
TEL 732-752-1800 • FAX 732-752-3967

NEW CLIENT FORM

DATE: _____ TIME: _____ a.m./p.m.

NAME: _____

HOME ADDRESS: _____

_____ ZIP CODE: _____

TELEPHONE: _____ FAX: _____

COMPANY NAME: _____

ADDRESS: _____

_____ ZIP CODE: _____

TELEPHONE: _____ FAX: _____

CELL PHONE: _____ EMAIL: _____

BILLING ADDRESS: COMPANY _____ HOME _____

CONTACT NAME TO SEND BILL TO: _____

PURPOSE OF VISIT: _____

REFERRED BY: _____

Date

Client Signature

Client Signature

Meeting Agenda

1. Review Goals and Objectives.
2. Discuss Current Condition.
3. Evaluate Problems.
4. Outline Possible Course of Action.
5. Identify Recommendations.
6. Plan for Steps to be Taken and the Responsible Person for Each Step.
7. Other: _____

8. Schedule Next Meeting.

Will Questionnaire

The information requested below is essential in preparing your Will. If you need more space to answer a question, attach a separate sheet and indicate the question number to which it pertains.

1. State your full legal name: _____
First Middle Last

- a. Age: _____
- b. Male _____ Female _____
- c. U.S. Citizen: Yes _____ No _____
- d. Married: Yes _____ No _____
- e. Divorced/ Separated: Yes _____ No _____

2. State your current address:

- a. Street Address: _____
- b. Mailing Address _____
- c. City: _____ County: _____
- d. State: _____ Zip Code: _____
- e. Telephone: Residence: _____
Work: _____
Cell: _____

3. If you are married, state the full legal name of your spouse/domestic partner (including maiden name):

First

Middle

Last

- a. Age: _____
- b. Male _____ Female _____
- c. U.S. Citizen: Yes _____ No _____
- d. Married: Yes _____ No _____
- e. Divorced/ Separated: Yes _____ No _____

4. If you have children, including adopted children, state the following for each child, including whether the child is from your current marriage, if applicable:

Full name	Son/Daughter	Age	Marital Status	Current marriage (yes or no)
-----------	--------------	-----	----------------	------------------------------

_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

5. a. Any deceased children? Yes _____ No _____

b. Are any children/grandchildren either disabled or require special needs?
Yes _____ No _____

6. If you have grandchildren, state the following:

Full name: _____

Full name: _____

Parent's names: _____

Parent's names: _____

Age: _____

Age: _____

Marital Status: _____

Marital Status: _____

Living: (Yes _____ No _____)

Living: (Yes _____ No _____)

Full name: _____

Full name: _____

Parent's names: _____

Parent's names: _____

Age: _____

Age: _____

Marital Status: _____

Marital Status: _____

Living: (Yes _____ No _____)

Living: (Yes _____ No _____)

7. Do you and your spouse/domestic partner have a Prenuptial agreement which identifies and disposes of separate spousal property? **(If yes, attach a copy.)**
 Yes _____ No _____

8. Have you or your spouse/domestic partner created any trusts or made any gifts to any trusts? If yes, describe and **attach a copy:**

9. Assets (list approximate values):

	Joint or Marital Property	Your Separate Property	Separate Property of your Spouse/Domestic Partner
a. Home	\$	\$	\$
b. Other real estate	\$	\$	\$
1.	\$	\$	\$
2.	\$	\$	\$
3.	\$	\$	\$
c. Checking, Savings, or Credit Union Accounts & Certificates	\$	\$	\$
1.	\$	\$	\$
2.	\$	\$	\$
3.	\$	\$	\$
4.	\$	\$	\$
5.	\$	\$	\$
d. Annuities	\$	\$	\$
e. U.S. Savings/ Other Bonds	\$	\$	\$
f. Stock	\$	\$	\$
g. Automobiles and Other	\$	\$	\$

Vehicles			
1.	\$	\$	\$
2.	\$	\$	\$
3.	\$	\$	\$
h. Interest in a Business	\$	\$	\$
i. Subchapter "S" Business	\$	\$	\$
j. All valuable personal property	\$	\$	\$
k. Household Furniture and Furnishings	\$	\$	\$
l. Misc.	\$	\$	\$
m. Life Insurance Policies	\$	\$	\$
n. Qualified Retirement Plans (401k, 403b, SEP, IRA)	\$	\$	\$
o. Other	\$	\$	\$
TOTALS - ASSETS	\$	\$	\$

10. Debts (list approximate values):

	Joint or Marital Value Property	Your Separate Property	Separate Property of your Spouse/Domestic Partner
a. Mortgages on Home, Car, etc	\$	\$	\$
b. Other Debts	\$	\$	\$
TOTALS - DEBTS	\$	\$	\$
TOTALS - NET ASSETS	\$	\$	\$

11. EXECUTOR: The person charged with administering your estate, paying taxes and other debts, marshalling, preserving and managing estate assets and property is called an executor. State the full name of the person you wish to serve in this role. He or she should be a United States resident.

a. First Choice: Spouse/Domestic Partner Other _____

b. Relationship: _____

If the person listed above is unwilling or unable to serve as a personal representative, please list an alternate:

c. Second Choice: _____

d. Relationship: _____

12. GUARDIAN: A guardian is a person lawfully invested with the power and charged with the duty of taking care of the person who is incapable of doing so because of age or other incapacity. If your children are under age eighteen (18) state the full name, address and relationship (if any) of the person you wish to act as their guardian (custodian) in the event of your death (in the case of a single parent) or in case of the joint death of you and your spouse/domestic partner (if married). You should obtain the consent of that person(s) before executing your Will.

a. Name (s): _____

b. Relationship: _____

13. TRUSTEE: A trustee is a person appointed to manage the financial affairs of one who is legally incapable of doing so because of age or other incapacity. Do you want the appointed guardian also to be the trustee of any assets inherited by the minor children?

Yes _____ No _____

If no, please list the person or entity you wish to act as their trustee.

a. Name (s): _____

b. Relationship: _____

14. The person who is designated in your Health Care Proxy Directive as your Health Care Representative is responsible for making health care decisions on your behalf. State the full name of the person you wish to act as your Health Care Representative.

a. First Choice: Spouse/Domestic Partner Other: _____

b. Relationship: _____

If the person is unable to serve as your Health Care Representative, please list an alternate:

c. Second Choice: _____

Relationship: _____

d. Second Choice: _____

Relationship: _____

15. The person who is designated in your Power of Attorney as your agent is responsible for making financial decisions on your behalf in the event that you are incompetent to do so. State the full name of the person you wish to act as your agent.

a. First Choice: Spouse/Domestic Partner Other: _____

b. Relationship: _____

If the person is unable to serve as your agent, please list an alternate:

c. Second Choice: _____

Relationship: _____

d. Second Choice: _____

Relationship: _____

Confirmation of information and instructions: I confirm the information provided by me in this questionnaire is complete and accurate, and that the instructions I am providing reflect my wishes.

Signature Date

Signature Date

SAMPLE RETAINER AGREEMENT

AGREEMENT TO PROVIDE LEGAL SERVICES

THIS AGREEMENT, dated _____, is made

BETWEEN: _____, whose address is

_____,
referred to as "You,"

AND: **MICHAEL KURAK, ESQ.**, 314 Route 22 West, Suite F, Green Brook, New Jersey 08812, referred to as the "Law Firm."

1. **Legal Services To Be Provided.** You agree that the Law Firm will represent You in the following matter:

Unless otherwise specifically addressed herein, the legal work includes all necessary research, correspondence, preparation, drafting of legal documents and related work to properly represent You in this matter.

2. **Additional Legal Services.** If You need any other services which may or may not be related to the above matter, You and the Law Firm may make a new agreement to provide the other services.

3. **Legal Fees.** The Law Firm cannot predict or guarantee what Your final bill will be. This will depend on the amount of time spent on your matter and the amount of other expenses. However, we discussed at our meeting that an estimate of your legal fees is in the range of _____.

A. **Initial Payment.** As you requested, the Law Firm will begin work on Your case, and you have agreed to send payment of \$_____ (the "Initial Payment"). This sum will be used to pay Your fees and expenses according to this Agreement and will be deposited in the Law Firm's general business account.

B. **Installments.** To assist you in making these payments, the Law Firm has provided the following installment plan:

1. The Initial Payment will be applied to Your initial bill.
2. At the time the Law Firm has completed the drafts of Your documents, You will be billed for a second installment in the same amount as the Initial Payment. This installment will also be applied toward your total fee.
3. The balance of Your Legal Fee as determined in accordance with this Agreement shall be due upon the signing of the documents. You will be presented with an invoice for the balance of Your fees at this meeting.

C. **Hourly Rate.** You agree to pay the Law Firm for legal services performed by an attorney at the hourly rate of \$350.00 and for legal services performed by a paralegal at the hourly rate of \$150.00.

D. **All Services Will Be Billed.** You will be billed at the hourly rate set forth in Paragraph 3B for all services rendered. This includes telephone calls (minimum charge of 6 minutes), dictating and reviewing letter, travel time to and from meetings, legal research, negotiation, and any other service relating to this matter.

4. **Costs and Expenses.** In addition to legal fees, You should expect to be billed for the following costs and expenses:

Filing fees, service fees, messenger services, photocopying charges, telephone toll calls, postage, and any other necessary expenses in this matter.

5. **Bills.** The Law Firm will send you itemized bills from time to time. All bills for costs and legal expenses are due upon receipt. You will be charged interest at a yearly rate of twelve (12%) percent on any balance due that is not paid within thirty (30) days from the date of the bill.

Signatures. You and the Law Firm have read and agree to this Agreement. The Law Firm has answered all of Your questions and fully explained this Agreement to Your complete satisfaction. You have been given a copy of this Agreement.

MICHAEL KURAK, P.C.

By: _____
MICHAEL KURAK, Esq.

SAMPLE

SAMPLE