



## Your Appointments:

### Complimentary Consultation

Date/Time: \_\_\_\_\_

- Attended by Client - 1 hour
- In-office or video conference
- Review and discuss Client objectives
- Provide quotation for estate plan (fixed fee)
- Schedule appointments

### Review Appointment

Date/Time: \_\_\_\_\_

- Attended by Client - 1 hour
- In-office or video conference
- Review key information and drafted documents

### Signing Appointment

Date/Time: \_\_\_\_\_

- Attended by Client – 30 minutes
- In-office (Witnesses and Notary Public present)
- Invoice balance due
- 24-hour cancellation policy (see back of card)

### Portfolio Delivery Appointment

Date/Time: \_\_\_\_\_

- Attended by Client – 30 minutes
- In-office (remote for family and fiduciaries)
- Original documents delivered to Client
- Review action items and provide instructions

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## **Late Cancellation Fee for Signing Appointment**

*If it is necessary to cancel an appointment, we request that you notify us at least 24 hours before your scheduled appointment ("Notice").*

*Notice allows us to better utilize appointments for Clients who may be in need of prompt legal assistance. Notice also avoids the need to reprint documents.*

*Failure to provide Notice will result in a late cancellation fee of \$150.*

Notes: \_\_\_\_\_

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