

Client Commitment Schedule

Estate Planning

Action		Note to adviser
1.	Initial meeting or conference	<i>This can involve you if you wish. Make sure your lawyer knows that you would like to be there or suggest having it at your office. That way your client is also in a familiar environment.</i>
2.	We send the client our client engagement letter and fee proposal	<i>You should be copied into this key piece of correspondence. If your client has a query about it, they will ring you!</i>
3.	Client returns the signed engagement letter and pays a retainer	
4.	We review the information provided and request any additional information from the client	<i>You should also be made aware of this additional information – some of it could be provided by you.</i>
5.	We prepare draft Estate Planning documents	
6.	Client reviews the draft documents and lets us know any comments or further instructions	
7.	We meet to finalise and sign client's Estate Plan	<i>You can be present if you would like, however at this stage the documents should be finalised so it's not necessary.</i>