

Arizona Estate Settlement Services Retainer Agreement

Services Provided by: **Financial Strategies Inc.**

Phone: In Valley: 480-345-1616 / Other: 1-800-782-2806

Starting Retainer Fee

I. Tax Preparation and Accounting/Consulting Services

I would like to retain Financial Strategies, Inc. (the service provider) for one or more of the following purposes: inventory collection, review and documentation, including obtaining "day of death" valuations of estate assets. Also, bookkeeping and tax preparation for the estate as well as the final personal income tax return preparation and filing. Miscellaneous services such as software review, data retrieval, etc. are also provided by this service.

\$ 500.00

Expense Reimbursements: It is understood any and all expenses for this service will post against retainer funds but only after discussed and approved via prior phone or written form authorizations by me.

(By Initialing, you understand these terms and engage this service for the estate)

Initials: _____

II. Certified Legal Document Preparation Services

I would like to retain Financial Strategies, Inc. (the service provider) for one or more of the following purposes: Preparation of any or all letters of instruction for informal probate proceedings, trust amendments or service form preparation, or preparation of any other estate planning legal document as required to administer, distribute estate assets, and close the estate.

\$ 500.00

Expense Reimbursements: It is understood any and all expenses for this service will post against retainer funds but only after discussed and approved via prior phone or written form authorizations by me.

(By Initialing, you understand these terms and engage this service for the estate)

Initials: _____

III. Insurance Agent/Broker Insurance & Pension Claims Review Service

I would like to retain Financial Strategies, Inc. (the service provider) for one or more of the following purposes: Help in pending health or Medicare claims, hospital bills regarding insurance claims. Review and help in making claims for all other insurance or pension benefits. Also, analysis and consulting for any larger IRA or Pension or Roth IRA accounts that are deemed to be inherited or beneficiary IRAs.

\$ 150.00

Expense Reimbursements: It is understood any and all expenses for this service will post against retainer funds but only after discussed and approved via prior phone or written form authorizations by me.

(By Initialing, you understand these terms and engage this service for the estate)

Initials: _____

Service Provider Billing Rate

I understand that the billing rate will be _____ per hour for any work performed and the starting retainer fee is due at inception for any service chosen and will be renewed for each selected service as needed until all services under retainer agreement have completed unless later cancelled.

(By Initialing, you understand these terms and agree to them)

Initials: _____

Estate Settlement Services Agreement Between Parties With Cancellation/Conclusion Provisions

We agree together to commence estate settlement services. Service provider serves **as advisor only** to authorized estate administrator. We understand that either party may cancel this retainer agreement's individual services or the entire agreement (all services) at any time by giving the other party a 24 hour written notice. Final accounting and billing and payment/refund will be determined and finalized within 10 days between the parties upon cancellation (if applicable) or upon estate settlement service order conclusion.

The estate hereby employs the service provider for the purposes selected. Total Starting Retainer Fee: \$ _____

Date Signed: _____

Estate Name: _____

Signature of Estate Representative

Co-Estate Representative (if applicable)

Print Name: _____ Print Name: _____

Company Representative: M.D. Anderson _____

Signature of Company Representatives

Accepted on this date: _____

Copies: Execute two copies so each party receives an original/money receipt

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