
FROM THE DESK OF
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Note To: **Prospective Client**

Date: **Today**

Re: **Statement Regarding My Services and Fees**

Thank you for considering our firm. I realize that you may have some questions about how I charge for my services.

Proper estate planning is a very personal endeavor. It should only be undertaken with utmost care. Your estate plan will dispose of all your assets upon your death or incapacity, and therefore warrants careful thought and attention.

In many situations, once I am able to review your Estate Planning Questionnaire and discuss your estate planning objectives with you, I will be in position to provide you with a close estimate of my fees for the services recommended. However, what you will pay for my services will depend on the time I am required to spend on your matter, and therefore, how much you assist me along the way will be important.

I will advise you ahead of time if circumstances arise such that my estimate of fees will be exceeded.

In complex estate plans, it can be difficult to estimate the total fee with exactness. The following are some examples of more complicated situations that often increase the cost of an estate plan:

- You want multiple trusts instead of one and/or you desire assistance with funding of a trust.
- If you are married, you have a premarital agreement that I must coordinate with your plan.
- You have a disabled child that is receiving government benefits.
- You desire to exclude one or more of your children as a beneficiary.
- If you are married, you have children of different marriages, and you want your respective shares of the estate to pass to your respective children.
- If you are married, neither of you wants your share of the estate to pass to someone your surviving spouse may choose to marry after you die.
- You own assets located in another country or another state.
- You own a subchapter S corporation.
- You are a party to a buy-sell agreement.
- You own an interest in a partnership or a limited liability company.
- You want to do some generation-skipping planning (for example, an irrevocable trust for the life of a child, followed by a distribution to grandchildren on the child's death).
- You have contributed large amounts to a qualified retirement plan or IRA.
- If you are married, one (or both) of you is not a United States citizen.
- If you are married, you have community property.
- You provide me incorrect information that causes me to have to change the estate plan.

- You indicate you will do some of the work, but then fail to do so.
- You want me to prepare an estate plan that requires a lot of original document drafting.

These are just some examples. Sometimes I cannot determine at the beginning of a matter the full nature and extent of my services because much of the work to be performed may depend on facts not yet known by me, information not yet provided by you, or preliminary and incomplete analysis. In these situations, the fees I will charge can't be predetermined with exactness.

Fees for specialized areas of law, such as estate controversy work (i.e., disputes between and among beneficiaries and fiduciaries) can be very difficult to estimate due to its particular nature. Those engagements will be charged based on time incurred.

I am confident that you find that my fees are very competitive for someone of my level of experience and expertise. In all events, it is very important to me that you are satisfied with the level of service you are receiving and the fees charged.