

INVOICE

Invoice No: _____
Date: _____
Due Date: _____

CLIENT INFORMATION

MATTER REFERENCE

FLAT FEE ESTATE PLANNING PACKAGE DESCRIPTION	AMOUNT
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Comprehensive Estate Planning Package

Includes: Last Will & Testament, Revocable Living Trust, Durable Power of Attorney, Healthcare Proxy, Living Will, and Asset Transfer/Funding Instructions. -----

County Recording & Deed Filing Fees

Real estate deed preparation and e-filing fees for trust funding. -----

Subtotal: _____

**Trust Account
Credit / Retainer:** _____

Total Due: _____

PAYMENT INSTRUCTIONS & TERMS

Please make checks payable to the operating account or remit wire transfer using the following credentials:

Flat fee agreements are earned upon receipt and deposited in accordance with professional conduct rules governing advance fees.