

INVOICE

Invoice No. _____
Date _____
Due Date _____

CLIENT INFORMATION

MATTER DETAILS

| DESCRIPTION OF ESTATE PLANNING SERVICES | HOURS / QTY | RATE | TOTAL |
|---|-------------|-------|-------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

PAYMENT INSTRUCTIONS

Trust Account Transfer / Check / Wire:

Bank Name: _____
Routing No: _____
Account No: _____

Subtotal _____
Filing Fees / Retainer _____
Total Due _____

Prepared By

Client Acknowledgment

Funds received for estate planning and asset protection services may be deposited into the firm's IOLTA/Trust Account in accordance with local professional responsibility rules. Legal services are deemed complete upon the execution of the agreed-upon trust documents, wills, powers of attorney, or other estate instruments.