YOUR  
LOGO

**COMPANY NAME**

ESTATE PLANNING CONSULTATION PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to assist with your estate planning needs. Our consultation services are designed to provide clarity and peace of mind as you prepare to protect your assets and provide for your loved ones.  
  
This proposal outlines the scope and process of estate planning consultation for [Client Name].

# Project Objectives

The primary goals are:  
  
- Understand your estate planning priorities and intentions  
- Design a strategy to protect assets and minimize estate taxes  
- Coordinate wills, trusts, powers of attorney, and healthcare directives  
- Ensure your legacy is structured according to your wishes

# Proposed Services

Our estate planning consultation services include:  
  
- Personal goals and asset review  
- Guidance on wills, revocable and irrevocable trusts  
- Planning for incapacity (POA, healthcare directives)  
- Strategies for charitable giving and wealth transfer  
- Coordination with attorneys and tax advisors if needed

# Scope of Work

Scope includes:  
  
- Review of current estate documents (if any)  
- Asset and beneficiary inventory  
- Family and legacy planning discussions  
- Summary recommendations report for legal drafting  
- Optional ongoing review and annual updates

# Timeline

Proposed consultation timeline:

|  |  |  |
| --- | --- | --- |
| Phase | Description | Estimated Date |
| Discovery & Intake | Discuss goals, family structure, and current documents | [Start Date] |
| Asset & Needs Review | Inventory assets and define distribution strategy | [Date] |
| Strategy & Recommendations | Present personalized plan summary | [Date] |
| Implementation Support | Coordinate with attorney or tax advisor | [Completion Date] |

# Pricing

Estimated cost breakdown for estate planning consultation services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Fee |
| Initial Consultation | Goal setting and estate overview | [Amount] |
| Planning Report | Estate structure, trust, and POA suggestions | [Amount] |
| Implementation Support | Liaison with legal or tax professionals | [Amount] |
| Optional Annual Review | Ongoing review and updates | [Amount] |
| Total Estimated Cost |  | [Total] |

# About Us

[Your Company Name] is a comprehensive financial planning and advisory firm with experience helping individuals and families manage legacy planning with confidence and care.  
  
- Experience: [X] years in estate, tax, and financial planning  
- Expertise: Asset protection, intergenerational transfers, charitable trusts  
- Mission: To simplify complex planning needs and ensure peace of mind for future generations

# Case Studies / Testimonials

Case Study: [Client Example]  
  
- Project: Multi-generational estate consultation and trust formation  
- Outcome: Avoided probate and estate tax exposure; provided structured legacy funding for children and grandchildren  
  
Testimonial:  
“[Your Company Name] provided patient, thoughtful advice throughout. We felt listened to and empowered.” — [Client Contact]

# Terms and Conditions

Payment Terms: 50% due at engagement, 50% upon delivery of recommendations.  
Client Responsibilities: Provide complete financial and family information for planning.  
Adjustments: Additional scenarios or legal support beyond scope may require separate engagement.

# Acceptance

To approve this Estate Planning Consultation Proposal and begin the consultation process, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client Name]  
Title: [If applicable]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_