



**Jodi Lee-White, LLB. CAE**

**Lee-White Law**

456 Gibson Street

Fredericton, NB E3A 4E9

(506) 476-4739

[jodi@WillsfortheUnWilling.com](mailto:jodi@WillsfortheUnWilling.com)

[www.WillsfortheUnWilling.com](http://www.WillsfortheUnWilling.com)

**I offer in-home Will and Power of Attorney preparation services in the region of Fredericton and Saint John, New Brunswick, Canada**

### ***Fees and Legal Services***

You know it is important to have a valid current Will and Power of Attorney, but you may not be sure about hiring a lawyer to prepare your Will and Power of Attorney.

You may be surprised to learn that, with some prior preparation, your Will and Power of Attorney planning package can be completed for the equivalent or less than the cost of home or car repairs, veterinarian care of a family pet, a couple of rounds of golf or a gym membership and definitely less often.

The difficulty most lawyers have in quoting a flat fee or an estimate over the phone prior to meeting a client is that particular information received from you can require additional investigation, research and legal work. Our ethical and professional responsibilities in the legal system require that we know our client, fully explore your personal situation and provide appropriate legal and tax advice for you and your beneficiaries.

A flat fee package may not be appropriate for clients in certain situations, including:

1. You or other close family members have legal ties (citizenship or former residence) in the United States or the UK;
2. You own assets outside New Brunswick;
3. More extensive financial and tax planning would greatly benefit your Estate Plan and ultimately, your beneficiaries, related to a business or other special assets or a family situation;

4. Your Will should include longer-term trusts for minors or persons with special needs and other directions that require extensive drafting and review; and
5. The maker of the Will or Power of Attorney has complicated health issues requiring assessment of mental capacity to ensure the Will and Power of Attorney will be upheld as valid and to minimize future conflict and disputes.

For most individual clients without additional special requirements, a Will and Power of Attorney planning package can be completed for an amount ranging from \$250 to \$500 plus HST and for couples from \$500 to \$1,000 plus HST.

This Will and Power of Attorney planning package includes an initial consultation by telephone or e-mail, two face to face meetings to review completed questionnaires, discuss and organize your plan, prepare the first version of your documents, make changes, execute the final version as well as delivery of the final documents.

1. In our first contact, I identify any potential conflicts of interest and discuss your request.
2. I will provide you with a questionnaire to complete in advance of our meeting and any general information that may relate to your situation.
3. We will set up a meeting at your home or other location convenient for you.
4. At the end of our first face to face meeting, I will confirm the fee I will charge upon completion of the file.
5. If, in my determination, the services you require are more specialized or risky, I will provide you with a quote before you commit to any obligation.
6. There is no charge for the first meeting, if you decide not to continue retaining my legal services.

**I will not be your lawyer until I provide you with a signed retainer letter.**

I also offer planning seminars and workshops for small groups. Call and ask me about “Live with Care, Die Prepared.”