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Retainer information

TO: You, my prospective client or clients

These are standard retainer terms when I provide legal services.

Authority to Act

You have asked me to act on your behalf in connection with your estate planning, including:

- the preparation of a Will (with Affidavit of Execution);
- one or more Powers of Attorney (Property \ Personal Care); and
- one or more Letters of Direction and Authority.

Confidentiality

I will meet with you alone in the privacy of your home. The information you provide me is **confidential** and will not be disclosed to anyone, except as required by law, as ordered by a Court or where waived by you in view of conflict of interest issues.

Together we will review the Information Questionnaire, any existing Will and Power of Attorney, discuss your options and organize your plan. I will confirm in writing the legal fees, disbursements and HST to be charged.

I will prepare draft documents and send them to you by e-mail \ mail for review. Once you are satisfied with the documents, we will set up an appointment to sign the documents. I will bring a Witness with me as required by law.

I will then provide an invoice in accordance with the fee I have quoted. Once the account is paid, I will provide you with a final report, the original documents and further information and advice appropriate to your situation.

Legal Capacity

In order to sign a Will and Power of Attorney, there are certain legal capacity thresholds that a client must meet. If I have any concerns about a client's ability to validly execute a document, it may be necessary to recommend additional steps be taken before proceeding. This may require additional charges. If, after further investigation, I determine it is not possible to execute the documents, I will advise you and close the file.

If there are other legal issues that arise during the preparation of these documents, I may refer you to other lawyers or professionals to complete those matters.

Potential Conflict of Interest

If I am preparing documents for more than one family member, even if everyone has common objectives and wishes to preserve positive family relations, it is always possible that, now or in the future, your interests may be in conflict with one another.

If a conflict develops that cannot be resolved, I cannot continue to act for anyone and may have to withdraw completely. There are ethical and professional duties that apply in such circumstances that may require further investigation and discussion.

Information Obtained

Retention: I will keep all information received in connection with this matter for as long as I consider necessary notwithstanding that it is completed. All documents, notes and forms will be archived electronically. **I am not able to store any original documents.** We will discuss how to protect these important items during our meeting.

Reliance: I am relying on the accuracy of the information you provide either directly or through your advisors and family. I may also receive information, confidential or otherwise, from other professionals and family members. I may also undertake searches of public registries to confirm information that you provide me.

Disclosure: I may request that you specifically authorize me to discuss your estate planning with your advisors. You also authorize me to release information concerning you to your attorneys or executors, and if necessary your beneficiaries, following death.

Communicating with you by E-Mail

There are risks associated with communicating by Internet email, including the lack of security, unreliability of delivery, and possible loss of confidentiality and privilege. Unless you request that I do not communicate by email, you accept that these risks exist and no responsibility or liability will be attributed in respect of risk associated with its use.

I will provide draft documents as a password-protected PDF attachment to the email. Your password is provided to you at your initial appointment.

Please ask me for an explanation if you have any questions.