

## Initial Consultation Agreement

Dear Prospective Client(s),

This Initial Consultation Engagement Letter sets forth the term and conditions of the initial consultation meeting between Carolina Estate Planning (the “Firm”, “us” or “we”) and the undersigned prospective client(s) (“you”):

1. Purpose. The purpose of the initial consultation is for us (a) to learn about you and your particular legal needs based on the information you provide; (b) to answer your questions to the best of our ability; (c) to identify your options and, to the extent possible, analyze the costs and benefits of those alternatives; (d) to help you determine your course of action, if any; (e) to discuss our fees and terms of representation if any attorney-client relationship is to be established after the meeting; and (f) to determine the next steps in the process, as appropriate.

2. Confidentiality. All information and documents that you provide to us at the initial consultation shall remain strictly confidential, whether or not you decide to retain us to provide legal services, except as authorized by you or otherwise provided under the North Carolina Rules of Professional Conduct.

3. Reliance Limited. Because it may be impossible to fully assess a matter within the time frame allotted for the initial consultation or with the information or documents that you provide at the initial consultation, you should not rely upon any legal opinions provided by us during the initial consultation concerning any legal matter.

4. Limited Scope. No attorney-client relationship is intended to be established by the initial consultation. The initial consultation is a limited scope service provided by us to help you determine whether you may want to retain us to provide legal services. At the conclusion of the initial consultation, there is no obligation for you to retain us, nor do we have an obligation to provide services to you, unless mutually agreed.

5. Engagement Agreement Required. Following the initial consultation, if you agree to retain us, and if we agree to provide services to you, then we will prepare a separate, more detailed Engagement Agreement to be executed by both parties. The new Engagement Agreement will supersede this Initial Consultation Agreement and will set forth the terms and conditions of our representation of you, including our fees and the specific services to be performed by the Firm.

6. Cost of Initial Consultation. Initial consultation are provided at a flat rate of **\$245.00**. Payment for the initial consultation is due before the start of the consultation. At the Firm’s discretion, the charge for the initial consultation may be credited to your account and applied against other charges if an attorney-client relationship is established after the conclusion of the initial consultation meeting.

**By making the required payment, you agree to the terms and conditions set forth above concerning your initial consultation meeting, and you understand that this meeting is limited in scope and will not establish an attorney-client relationship with Carolina Estate Planning.**