# Texas Legacy

WILLS AND TRUSTS, PLLC

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June 17, 2026

[Via Email]
Prospective Client

Re: Last Will & Testament, Terms and Conditions

Dear Sir or Madam:

Thank you for your interest in retaining Texas Legacy Wills & Trusts, PLLC (the "Firm") to assist with your estate planning. To help me evaluate your needs and recommend the right services, please complete the enclosed questionnaire as thoroughly as you can and return it with the signed engagement letter. Once I receive both, I will review your information, determine the appropriate scope of services, and begin preparing the initial draft of your documents.

My services are intended primarily for straightforward planning, meaning matters that do not require complex tax planning, trust planning, or extensive analysis of how assets are titled and transferred. If your circumstances call for more than a straightforward plan, I will discuss the expanded scope and any additional fees with you before proceeding.

For many clients, a straightforward plan includes not only a Last Will and Testament but also documents addressing incapacity during life, such as a Statutory Durable Power of Attorney, a Medical Power of Attorney, and a Directive to Physicians. Together, these address both the disposition of your property at death and the management of your affairs if you become unable to act for yourself.

My fees depend on the scope of services required. After reviewing your questionnaire, I will discuss the package best suited to your circumstances, including the documents to be prepared and the applicable fees. The enclosed engagement letter explains the basis of my fees in full.

I look forward to assisting you with your estate plan.

/s/Mario G. Perez, Jr.________________________________
Mario G. Perez, Jr.
Attorney at Law
Texas Legacy Wills and Trusts, PLLC

Enclosures

- Engagement Terms and Conditions
- Estate Planning Questionnaire

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## Texas Legacy Wills and Trusts, PLLC

# WHY ESTATE PLANNING MATTERS

*Estate planning is not only for the wealthy. It is how you put your choices in writing and make things easier for the people you care about. A clear plan now spares your family the time and expense of a complicated probate later, so an estate plan often pays for itself.*

### WITHOUT A PLAN

- Texas law decides who inherits your property.
- Your family may need a court order before they can access your financial accounts
- Default legal rules control who may act if you cannot make decisions.
- Your family may face more paperwork, delay, expense, and uncertainty.
- The person you would choose may not be the person authorized to decide.

### WITH A PLAN

- You choose who receives your property.
- You name the person who will handle your estate.
- You choose who can manage finances if you cannot.
- You choose who can make medical decisions if you cannot.
- Your family has clear written instructions.
- May help protect your assets from long-term care and nursing home costs

! Estate planning protects you during life, too. A will works after death. Powers of attorney and medical directives help while you are living if illness or injury prevents you from acting.

### A SIMPLE ESTATE PLAN MAY INCLUDE

**WILL**

Names who receives property and who handles the estate.

**FINANCIAL POWER OF ATTORNEY**

Names someone to manage financial matters if needed.

**MEDICAL POWER OF ATTORNEY**

Names someone to make health-care decisions if you cannot.

**LIVING WILL / GUARDIAN CHOICE**

States treatment wishes and who you prefer as guardian, if needed.

***More control for you. Less uncertainty for your family.***

General information only. The right documents depend on your circumstances and goals.

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Prospective Client

Re: Last Will & Testament, Terms and Conditions

Dear Sir or Madam:

Thank you for your interest in Texas Legacy Wills & Trusts, PLLC (the "Firm"). I appreciate the opportunity to assist you with your estate planning. This letter explains the terms upon which the Firm may provide legal services to you and is intended to make the process as clear and straightforward as possible. Please review it carefully, and if you agree to these terms, please sign and return a copy together with your completed questionnaire.

**Scope of Engagement**

The Firm's estate planning services are intended primarily for straightforward planning matters. In general, this includes situations in which the client's objectives and assets do not require complex tax planning, trust planning, business planning, or extensive legal analysis regarding the transfer, titling, or disposition of assets. After receiving and reviewing your completed questionnaire and any additional information requested, the Firm will determine the scope of services appropriate for your circumstances.

The Firm's representation will be limited to the estate planning services specifically agreed upon in writing after review of your questionnaire and other information you provide. Depending on your circumstances, a straightforward estate plan may include a Last Will and Testament, a Statutory Durable Power of Attorney, a Medical Power of Attorney, and a Directive to Physicians. No services outside the agreed scope of representation are included unless expressly confirmed by the Firm in writing.

**Excluded Services**

Unless expressly agreed otherwise in writing, the Firm's representation does not include trust preparation, deed preparation, transfer-on-death deed preparation, beneficiary designation review, business planning, estate-tax planning, gift-tax planning, asset-protection planning, probate proceedings, litigation, or advice regarding the administration of an estate after death. If, during the course of the representation, the Firm determines that your circumstances involve substantial, unusual, or complex assets, or otherwise require services beyond a straightforward estate plan, the Firm may recommend an expanded scope of representation. In that event, the Firm will discuss the additional work and any additional fees with you before proceeding.

**Client Responsibilities**

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You agree to provide complete and accurate information to the Firm, and you understand that the Firm will rely on the information you provide in preparing your estate planning documents. You are responsible for promptly notifying the Firm of any changes in family circumstances, assets, beneficiaries, fiduciary choices, or planning objectives that may affect the documents being prepared.

You further understand that the effectiveness of any estate plan depends in part on the accuracy of the information provided and, where applicable, the manner in which assets are titled, designated, or transferred. The Firm may request additional documentation or clarification if necessary to determine whether assets may be disposed of in the manner you desire consistent with applicable law and the governing account, title, or beneficiary documents.

**Fees and Expenses**

The Firm's fees depend on the nature and scope of the services required. The Firm's standard hourly rate is $300.00 per hour. For many straightforward estate planning matters, however, the Firm may offer certain services on a flat-fee basis. After reviewing your questionnaire and confirming your planning needs, the Firm will advise you in writing of the applicable fee arrangement, including which services, if any, will be provided for a flat fee and which services, if any, will be billed at the Firm's standard hourly rate. Any specific written fee quote or package description provided by the Firm for your matter will control over the general provisions of this section.

Any flat fee applies only to the specific services and documents identified by the Firm in writing. If you request additional services, or if the Firm determines that your circumstances require work beyond the agreed scope of representation, such additional work may be billed separately at the Firm's standard hourly rate or under a separate flat-fee arrangement, as the Firm may communicate in writing. This may include, by way of example, additional consultation, asset review, transfer analysis, deed preparation, beneficiary-designation review, trust planning, tax-related planning, business-related planning, or revisions made necessary by information not previously disclosed to the Firm.

You are also responsible for reasonable out-of-pocket expenses associated with the representation, including notary fees, witness fees, travel-related expenses, shipping charges, recording fees, filing fees, and other third-party costs required to complete the services. If the Firm coordinates a signing ceremony or related execution services, any unusual or excess costs beyond those included in the agreed fee may be billed separately.

**Payment Terms**

Payment is due in the manner and at the times communicated by the Firm. The Firm may require payment in advance of beginning work, may require periodic payments as work progresses, and may defer completion, release, execution coordination, or final delivery of documents until all amounts then due have been paid. If the Firm agrees to a payment plan, the terms of that

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arrangement must be confirmed in writing, and the Firm may suspend work or withhold further services if payments are not made as agreed.

**Acceptance of Representation**

The Firm is not obligated to undertake representation until you have signed and returned this letter, provided any requested intake materials, and the Firm has confirmed acceptance of the matter. The Firm reserves the right to decline representation for any lawful reason, including conflicts of interest or circumstances outside the Firm's intended practice model.

**Execution and Effectiveness of Documents**

You understand that estate planning documents generally do not become legally effective for their intended purpose unless they are properly executed in compliance with applicable law. The Firm's representation may include preparing documents for execution, but you remain responsible for participating in the signing process and completing any additional steps necessary to make the documents effective.

You also understand that a will does not control every asset in every circumstance. Certain assets may pass by beneficiary designation, survivorship agreement, or title designation, and additional planning may be necessary if you wish those assets to pass in a particular manner.

**No Guarantee of Tax or Probate Avoidance**

The Firm does not guarantee that the estate plan will avoid probate, reduce taxes, eliminate future disputes, or accomplish objectives that depend on future changes in law, asset ownership, beneficiary designations, or facts not disclosed to the Firm. Any estate plan is based on the facts known to the Firm at the time the documents are prepared.

**File Retention**

At the conclusion of the matter, the Firm may retain copies of the Client's file in accordance with its file retention policies. The Client is encouraged to keep original signed estate planning documents in a safe location and to inform appropriate persons of their location.

**Termination of Representation**

You may terminate the representation at any time upon written notice, subject to payment for services already rendered and costs incurred. The Firm may withdraw from the representation as permitted by applicable rules of professional conduct and applicable law, including where you fail to cooperate, fail to provide requested information, fail to make required payments, or where continued representation would be impracticable or improper.

**No Continuing Duty to Update**

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Unless separately agreed in writing, the Firm's representation concludes upon completion of the agreed services. The Firm does not undertake a continuing obligation to update your estate plan to reflect future changes in family circumstances, finances, or law. You are encouraged to review your estate plan periodically and to seek further legal advice if circumstances change.

**Notice to Client**

The State Bar of Texas investigates and prosecutes professional misconduct committed by Texas attorneys. Although not every complaint against or dispute with a lawyer involves professional misconduct, the State Bar's Office of the Chief Disciplinary Counsel will provide you with information about how to file a complaint. For more information, please call toll-free 1-800-932-1900.

**Acknowledgment**

I appreciate the confidence you have placed in me. If you agree to the terms set forth in this letter, please indicate your acceptance by signing and dating below and returning one signed copy to my attention. If you have any questions about the handling or billing of this matter, now or later, please let me know so that I may address them promptly. I look forward to assisting you with your estate planning goals.

Very truly yours,

/s/Mario G. Perez, Jr.________________
Mario G. Perez, Jr.
Attorney at Law
**TEXAS LEGACY WILLS AND TRUSTS, PLLC**

**AGREED TO AND ACCEPTED BY:**

**CLIENT**

________________________________ Date: ________________
Signature

________________________________
Printed Name

# Texas Legacy Wills and Trusts, PLLC
# Estate Planning Questionnaire

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*All information will be kept strictly confidential.*

*Thank you for your interest in Texas Legacy Wills & Trusts, PLLC. Please complete this questionnaire as thoroughly and accurately as possible. We will use the information you provide to evaluate your estate planning needs, determine the appropriate scope of services, and prepare recommendations and documents.*

## I. Personal Information

1. Full legal name ______________________________
2. Other name(s) ever used ______________________________
3. Preferred name ______________________________
4. Date of birth ______________________________
5. Place of birth ______________________________
6. Social Security number ______________________________
7. Citizenship / nationality ______________________________
8. Home address ______________________________

______________________________

9. Years living in Texas ______________________________
10. Home / cell phone ______________________________
11. E-mail address ______________________________
12. Preferred method of contact:

☐ Phone ☐ E-mail ☐ Mail

## II. Family and Heirs

*Because you are not married and have no children, the persons who would inherit from you under Texas law if you died without a will (your heirs) would generally be your parents, then your siblings and their descendants. Please provide the following.*

**Parents:**

Mother ☐ Living ☐ Deceased Name: ______________________________

Father ☐ Living ☐ Deceased Name: ______________________________

Do you have any siblings (including half-siblings)? ☐ Yes ☐ No

*If yes, please list each below. For any deceased sibling, note whether they left children.*

**Sibling 1**

Name ______________________________

Living ☐ Yes ☐ No  Relationship (full / half): ______________________________

Address ______________________________

If deceased, surviving children ______________________________

**Sibling 2**

Name ______________________________

Living ☐ Yes ☐ No  Relationship (full / half): ______________________________

Address ______________________________

If deceased, surviving children ______________________________

**Sibling 3**

Name ______________________________

Living ☐ Yes ☐ No  Relationship (full / half): ______________________________

Address ______________________________

If deceased, surviving children ______________________________

Does anyone else depend on you for support? ☐ Yes ☐ No

______________________________

Does anyone you intend to provide for have a disability or condition requiring special consideration? ☐ Yes ☐ No

______________________________

## III. Existing Estate Planning Documents

*Please check any you have created, and bring copies of any that are readily available.*

☐ Will

☐ Codicil

☐ Revocable or other trust

☐ Transfer on Death Deed

☐ Financial Power of Attorney

☐ Medical Power of Attorney

☐ Directive to Physicians (Living Will)

☐ Declaration of Guardian

☐ Burial or cremation instructions

☐ Other

For each checked, note the date created and whether still in effect ______________________________

______________________________

Have you ever filed a federal gift tax return? ☐ Yes ☐ No

## IV. Other Advisors

*List any attorney, accountant, financial planner, insurance agent, or other advisor who may need to be involved.*

**Advisor 1**

Name ____________________

Profession / company ____________________

Phone / e-mail ____________________

**Advisor 2**

Name ____________________

Profession / company ____________________

Phone / e-mail ____________________

## V. Asset Inventory

*Please give your best estimate of what you own. Approximate values are sufficient. Because you have never been married, your property is generally your separate property, so there is no need to classify assets as community or separate.*

### *A. Real Property*

Address (including county) ____________________

Approximate value ____________________

Mortgage holder and balance owed ____________________

Is this your homestead? ☐ Yes ☐ No

Any other real property (describe) ____________________

### *B. Financial Accounts (Bank Account, Stock Accounts, Etc.)*

*Please use separate pages if you require more space.*

Institution and account type ____________________

Approximate balance / beneficiary on account, if any ____________________

Institution and account type ____________________

Approximate balance / beneficiary on account, if any ____________________

### *C. Retirement and Insurance*

Retirement plans (type, balance, beneficiary) ____________________

Life insurance (insurer, face value, beneficiary) ____________________

Annuities (issuer, value, beneficiary) ____________________

### *D. Personal Property and Vehicles*

Vehicles (year, make, model, value) ____________________

Valuable personal property (jewelry, art, collections) ____________________

Approximate value of household furnishings ______________________________

*E. Business Interests*

Do you own any interest in a business, farm, or ranch? ☐ Yes ☐ No

If yes, name, type of entity, and your ownership share ______________________________

*F. Other Assets and Liabilities*

Mineral interests (oil, gas, royalty) ______________________________

Money owed to you / notes receivable ______________________________

Total approximate debts and liabilities ______________________________

Are you a beneficiary or trustee of any trust, or do you expect to inherit from anyone? ☐ Yes ☐ No

______________________________

## V. How You Want Your Property Distributed

*Please tell me your wishes. If a person you name does not survive you, please indicate what should happen to that gift. You have explained that you wish to leave everything to your sister. If that remains your wish, you may skip to number 7.*

1. Specific gifts of particular items (describe the item and the recipient, for example, "my family heirloom should go to my mother"):

______________________________

______________________________

2. Specific gifts of cash (amount and recipient):

______________________________

3. Charitable gifts, if any (charity and amount or share):

______________________________

4. Who should receive the remainder of your estate (the residuary)?

______________________________

5. If none of the persons named above survives you, who should receive your estate?

______________________________

6. Do you have pets you wish to provide for? ☐ Yes ☐ No

______________________________

7. Your sister's information, so that it can be included in your will:

Full legal name ______________________________

Date of birth ______________________________

Current address ______________________________

8. If your sister does not survive you, who should receive your estate instead (your sister's heirs may be appointed)?

Full legal name ______________________________

Date of birth ______________________________

Current address ______________________________

______________________________

______________________________

## VI. People Who Will Act for You

*Executor: the person who will collect your property, pay your debts, and distribute your estate as your will directs. Please also name a successor in case your first choice cannot serve.*

First choice for executor / relationship / phone:

______________________________

Successor executor / relationship / phone:

______________________________

*(If you are also interested in a Power of Attorney, please indicate who you wish to serve as Agent under Financial Power of Attorney, who will have legal authority to manage your financial affairs if you are unable to do so)*

First choice for executor / relationship / phone:

______________________________

Successor executor / relationship / phone:

______________________________

*(If you are also interested in a Medical Power of Attorney, please indicate who you wish to serve as Medical Power of Attorney, who will have the legal authority to make health care decisions for you if you cannot make them yourself.)*

First choice for executor / relationship / phone:

______________________________

Successor executor / relationship / phone:

______________________________

## VII. Other Documents to Discuss

*Please check any you would like to discuss*

☐ Directive to Physicians (Living Will)

☐ Declaration of Guardian for yourself

☐ Review of beneficiary designations on retirement and insurance accounts

## VIII. Anything Else

*Please note any other concern, question, or circumstance you believe may affect your estate plan.*

____________________________________________________________

____________________________________________________________

____________________________________________________________

Client signature ____________________________________________

Date ______________________________________________________