



**ARIZONA ESTATE PLAN DOCUMENT PREPARATION AGREEMENT
ATTORNEY PREPARED, NOT DOCUMENT PREPARER PREPARED**



Complete this agreement to hire Arizona estate planning attorney Richard Keyt and KEYTLaw, L.L.C. (the "Firm") to prepare one or more estate planning documents created for use solely for Arizona residents. Paragraph 4 on this page states exactly what the Firm will do and the cost. Rick, a former partner in one of the largest law firms in Arizona, has practiced law in Arizona since 1980. He has a masters degree (LL.M.) in federal income tax law from New York University School of Law.

For information about the Firm, see www.keytlaw.com and Rick's [biography](#). For in depth articles about Arizona wills, trusts and estate planning, see the [Arizona Estate Planning Library](#). If you have questions about estate planning for an Arizona resident or this Agreement, call Rick at 602-906-4953, ext. 101 (no charge for questions about estate planning).

You can complete this form in 5 – 10 minutes by typing the answers directly in the blank spaces or print the form and complete it with a pen.

ESTATE PLAN DOCUMENT PREPARATION SERVICE

Use this form to hire the Firm to prepare one or more of the attorney prepared custom drafted estate planning documents listed on page 2. **Check the box on page 2 next to each document that you want us to prepare for you and your spouse (no extra charge for a second document for your spouse)**. Each document is either \$195 or \$97. If you are married, we will prepare two of each document you select (one for each spouse) at no extra charge. You can purchase all of the documents for \$997, a saving of \$463 off the full price of \$1,460 if you paid for all ten documents separately.

WHAT HAPPENS AFTER YOU PURCHASE DOCUMENTS

Once we get this completed Estate Plan Document Preparation Agreement and payment in full, the following will occur: (i) within 7 – 10 days (or 1 or 3 business days if you purchase expedited document preparation service) we will prepare all of the documents that you order, (ii) we will send the documents to you in digital form as attachments to an email message in Adobe .pdf format, (iii) we will also email instructions to you on how to sign the documents in front of a notary and a witness, (iv) you will be responsible for arranging for a notary and witness and signing the documents in front of the notary and a witness. Our services end when we deliver the documents to you, but if we make any mistakes on your documents, we will correct the mistake at no charge within thirty days of delivering the documents to you. If you want us to send you hard copies of your documents, it's an extra \$100 and you must check the box near the bottom of page two that is titled **For Hard (Paper) Versions of the Documents Mailed to You**.

MISCELLANEOUS

We require payment in advance before we provide any services. Unless there are unforeseen costs (for example you want us to send documents to you via FedEx) or developments or you hire us for additional services unrelated to preparing your estate plan documents (at our current hourly rates), the amount you agree to pay in this Agreement will be the only amount you pay us for preparing your estate plan documents. We will email you an itemized invoice. You agree to pay any unpaid amount within ten days after we mail the invoice. If you do not pay an invoice within thirty days, we may charge interest on unpaid amounts at the rate of 1.5% per month, and we may terminate our services and/or withdraw from further representation you. The entire amount you pay KEYTLaw, LLC, for fees and costs is nonrefundable, but you may nevertheless discharge KEYTLaw, LLC, and Richard Keyt at any time and in that event you may be entitled to a refund of all or part of the fee based upon the value of the representation.

You are not hiring us to advise you with respect to your estate plan or how to reduce or save federal estate or income taxes. We are hired to prepare specific documents based on the information you give in this document. If your estate will exceed \$1,000,000, you should consult with a tax advisor and take action to reduce federal estate taxes on your death and the death of your spouse. After we prepare your estate plan documents, we will not provide any additional legal or estate planning related services to you unless we agree to do so in writing. We will close your estate planning file as soon as your final documents are delivered to you. This will formally end our representation and engagement on this matter. The estate plan documents that we will prepare for you will be based upon the law in effect on the date you sign this Agreement. We are not obligated to revise or supplement the documents we prepare for you when the law changes in the future by legislative action, judicial decision, or otherwise. We are not acting as your attorney in advising you with respect to this Agreement because we would have a conflict of interest in doing so. If you have questions about this Agreement, we recommend that you consult with other legal counsel.

SELECT THE DOCUMENTS & SERVICES YOU WANT TO PURCHASE

Click your mouse on the boxes below to put an X in the box and select the documents & services you want to purchase at the prices indicated below. Push the **TAB** key to move to the next field and the **SHIFT + TAB** key to move backwards.

Primary Estate Plan Documents

- \$195 **Last Will & Testament:** Gives your probate assets to the heirs you name in the Will. If you have minor children, your Will is the document where you name one or more people to be the guardian(s) of your minor children if something happens to you and your spouse.
- \$195 **Durable Financial Power of Attorney:** Authorizes somebody you name to handle your financial affairs (such as writing checks from your checking account) if you cannot.
- \$195 **Living Will:** Authorizes a doctor to remove life support ("pull the plug") if you are not conscious and are being kept alive by a machine or in a terminal condition. **Avoids the Terry Schiavo problem and the need for your family to spend a lot of money to get a court order to pull the plug.**
- \$195 **Health Care Power of Attorney:** Authorizes a person you name to make medical care decisions for you if you are not able. **Avoids the Terry Schiavo problem and the need for your family to spend a lot of money to get a court order naming a person who can make decisions about your health care.**
- \$195 **HIPAA Authorization:** Authorizes Health Care providers to give information about your health, medical condition and treatment to your designated agent (usually the person named as your health care agent).

Secondary Estate Plan Documents

- \$ 97 **Health Care Power of Attorney for Minors:** Used by parent(s) to designate another family member or friend to make Health Care decisions for an injured minor child if both parents are incapacitated.
 - \$ 97 **Mental Health Care Power of Attorney:** Authorizes somebody you select to make decisions for you about your mental health if you cannot.
 - \$ 97 **Organ Donation Declaration:** Gives permission to donate all or parts of your body for medical purposes.
 - \$ 97 **Post Mortem Wishes:** Used to plan your funeral or memorial service. It's a non-binding fill-in-the-blanks letter for you to tell you family if you want an obituary, where to print it, the contents of it, what music to play or scriptures to read, pallbearers and other information to let them know what you want after you are gone.
 - \$ 97 **Personal Property Memorandum:** Used to give certain tangible assets to your heirs without modifying your Will or seeing an attorney.
 - \$997 **Complete Document Bundle:** Purchase all 10 of the documents listed above for husband and wife (20 documents) and save \$463 off the \$1,460 price to purchase all of the documents separately. Make sure no boxes above this line are checked so that the total below will be correct.
 - \$100 **For Hard (Paper) Versions of the Documents Mailed to You:** If you do not purchase this option we deliver the documents to you as Adobe pdf attachments to an email message. If you want hard copies of the documents mailed to you in addition to the digital pdf versions, check the box to the left.
 - \$200 **One Business Day Super Expedited Document Preparation Service** (normally 7 - 10 days)
 - \$100 **Three Business Day Expedited Document Preparation Service** (normally 7 - 10 days)
 - \$150 **Document Notary & Signing Service:** Sign all of your documents in our office using our notary, but you must bring one adult witness who is not an heir or beneficiary of any of your assets.
 - \$100 **Digital Document Service:** If you use our notary & signing service, we will scan all of your documents and put them on a CD so that you have all of your signed documents in digital format (Adobe pdf format).
- \$_____ Total amount to be paid to KEYTLaw, LLC.

YOUR INFORMATION

Exact legal name: _____

Gender: male female

Home Address: _____
 Street Address City, State Zip Code

US Citizen: Yes No Country: _____

Primary phone: _____ E-mail: _____

Marital status: single married co-habiting

YOUR SPOUSE'S INFORMATION

Exact legal name: _____

Gender: male female

Home Address: _____
 Street Address City, State Zip Code

US Citizen: Yes No Country: _____

Primary phone: _____ E-mail: _____

CHILDREN

List All Children: To disinherit a child from your Will, check the box in the Disinherit Child column after the child's name

Full Legal Name of All Children & Date of Birth		Whose Child?	Disinherit Child
In the column to the right, put an H, W or J to indicate if a child Is husband's, wife's or both H & W		H (husband) / W (wife) J (H & W)	Child check box
_____	_____	_____	_____
Full name of child	Birth Date (mm/dd/yyyy)		
_____	_____	_____	_____
Full name of child	Birth Date (mm/dd/yyyy)		
_____	_____	_____	_____
Full name of child	Birth Date (mm/dd/yyyy)		
_____	_____	_____	_____
Full name of child	Birth Date (mm/dd/yyyy)		
_____	_____	_____	_____
Full name of child	Birth Date (mm/dd/yyyy)		

LAST WILL & TESTAMENT

Please indicate below your choices for the Personal Representative (Executor) of your probate estate (assets owned by you at death that do not transfer automatically to others). The personal representative's job is to collect your probate assets, pay your last expenses then distribute your probate assets to your heirs. List your choices for Personal Representative in order of priority. People named as a Personal Representative do not have to be residents of Arizona.

Who will serve as Personal Representative of your estate? You need at least one choice.

Each spouse for the other? Yes No List next agents in order of priority below.

Husband

Wife

1st choice

2nd choice

3rd Choice

GUARDIANS OF YOUR MINOR CHILDREN

A guardian is a person or a married couple that you want to become legally responsible to care for your children (providing a home, food, clothing and all other child-rearing type duties) until the minors are 18. Who do you want to be the guardian(s) for your children under age 18 if you die or become unable to care for them? If you want two people to be guardians at the same time, list them on the same line.

Husband

Wife

1st choice

2nd choice

3rd Choice

WHO WILL INHERIT YOUR PROPERTY

List specific money or property that you want to give on your death to any individuals, organizations or charities. Beneficiaries named here will receive the gifts before your remainder beneficiaries and if all of your property is given away to these specific beneficiaries, there will be nothing left to go to your other beneficiaries named in the next section:

**Donor
(H) or (W)**

**Name of Beneficiary
& Relationship**

Describe Gift

After making the specific gifts named above, who gets the remainder of your probate assets?

Name Who Will Inherit the Remainder of Your Probate Assets

Each Spouse Check's Boxes only in Item 1, 2 or 3

Husband Wife

- 1. Spouse; but if the spouse is dead, then to my children equally.
 - A. If the spouse and a child are deceased and the deceased child has any children, the inheritance of the deceased child goes instead equally to the children (your grandchildren) of my deceased child.
 - B. If the spouse and a child are deceased and the deceased child has any children, the inheritance of the deceased child goes instead equally to your other surviving children rather than to the children (your grandchildren) of the deceased child.
- 2. My children equally, but if a child is dead, then:
 - C. If deceased child has any children, the inheritance of the deceased child goes instead equally to the children (your grandchildren) of the deceased child.
 - D. If the deceased child has any children, the inheritance of the deceased child goes instead equally to your other surviving children rather than to the children (your grandchildren) of the deceased child.
- 3. Other (describe exactly who gets what).

If there are any family members to whom you do not want to leave any probate assets, list the exact name and relationship of the family members you want to disinherit:

Name of Person to Disinherit	Relationship to	Husband	Wife
<hr/>	<hr/>		
<hr/>	<hr/>		
<hr/>	<hr/>		
<hr/>	<hr/>		

GUARDIANS OF YOUR MINOR CHILDREN

A Guardian is a person or a married couple that you want to become legally responsible to care for your children (providing a home, food, clothing and all other child-rearing type duties) until the minors are 18. Who do you want to be the Guardian(s) for your children under age 18 if you die or become unable to care for them? If you want two people to be Guardians at the same time, list them on the same line.

	Husband	Wife
1st choice	_____	_____
2nd choice	_____	_____
3rd Choice	_____	_____

DURABLE FINANCIAL POWER OF ATTORNEY

Your Financial Power of Attorney ("FPOA") is a document that gives your designated Agent(s) the right and power to act for you with respect to your financial affairs if you are alive and incompetent. This document only affects your property that is not owned by a trust (if you have a trust). Your FPOA will become effective if and only if you become incompetent. Your FPOA and the powers given to your Agent(s) in the FPOA terminate on the moment of your death. The FPOA we prepare for you is very comprehensive. The purpose of the FPOA is to prevent your Agent(s) from having to go to court to be appointed your conservator if you become incompetent.

Please indicate your choices of people who you appoint manage your financial affairs if you are not able. Because your designated Agent(s) will have the power to deal with your financial affairs the same as you could if you were able, select only people who you trust completely. Typically, the Agent chosen is a spouse or a trusted family member or friend. Spouses usually name each other, then select successor agents. You may have co-Agents who would have to act together to exercise any power granted in the FPOA.

Who will serve as your Agent or Co-Agents under your financial Power of Attorney?

Each spouse for the other? Yes No List next in line choices below? If two people are to hold the power jointly, list their names on the same line.

	Husband	Wife
1st choice	_____	_____
2nd choice	_____	_____
3rd Choice	_____	_____

HEALTH CARE POWER OF ATTORNEY

The Health Care Power of Attorney is a legal document by which you give an Agent the ability to make health care decisions on your behalf if you are unable to do so. Typically, the Agent chosen is a spouse, a trusted family member or a friend. Spouses usually name each other as the first choice. You may have more than one Agent and may choose whether the Co-Agents may act independently of each other or if they would have to join in the exercise of the power.

Who will serve as your Agent or Co-Agents Health Care Power of Attorney?

Each spouse for the other? ___ Yes ___ No List next agents in order of priority below. If two people are to hold the power jointly, list their names on the same line.

Husband

Wife

1st choice

2nd choice

3rd Choice

LIVING WILL

A Living Will is a document in which you instruct your family and Health Care providers that you do not want to be kept alive by machines if you are in a terminal condition or are "brain dead." Put an X in your column to indicate your choice.

Husband

Wife

If you are in a terminal condition, do you want action taken to prolong your life?

If you are in brain dead or in a persistent vegetative state, do you want action taken to prolong your life?

Do you want fluids and hydration?

Do you want food and nutrition?

Do you want CPR, electric shock or drugs?

If you are pregnant, do you want everything done to save the life of your unborn child? n/a

HEALTH CARE POWER OF ATTORNEY FOR MINOR CHILDREN

A Health Care Power of Attorney for Minor Children is a document in a parent, names people who can make medical decisions for children under age 18. Designate your child's Health Care agent(s) if both parents are deceased, incompetent or unable or cannot be found. Because Arizona law limits the term of this document to six months, we give it to you in Adobe pdf format with blank spaces so you can fill it out every six months and sign it in front of a notary.

Name the Agents in Order of Preference

1st choice

Full Name

Phone

Street address

city,

state and zip code

2nd choice

Full Name

Phone

Street address

city,

state and zip code

3rd Choice

Full Name

Phone

Street address

city,

state and zip code

SIGNATURES

We will prepare your estate planning documents based on the information you enter in this form. By signing this Agreement, you represent that all information contained in this Agreement is accurate and complete. The Firm will not prepare your estate plan and related documents unless: (i) you and the Firm both sign this agreement, and (iii) you pay in advance the entire cost for the documents and services that you order.

If you have any questions about this Agreement or any of the documents or services in this Agreement, call Richard Keyt's legal assistant Milena at 602-906-4953, ext. 106.

YOU AND YOUR SPOUSE MUST SIGN THIS AGREEMENT OR WE CANNOT PREPARE THE DOCUMENTS

Signature of Client

KEYTLaw, L.L.C., an Arizona limited liability company

Signature of Spouse

By: _____
Richard Keyt, Manager

HOW TO DELIVER THIS AGREEMENT TO KEYTLAW

SIGN THIS AGREEMENT BEFORE FAXING, MAILING, EMAILING OR DELIVERING IT TO RICHARD KEYT.

1. **Fax:** Fax this Agreement directly to Richard Keyt at 602-297-6890. You do not need a cover sheet.
2. **Email:** After you and your spouse sign this Agreement, scan it and send it to Richard Keyt as an attachment to an email message addressed to rickkeyt@keytlaw.com.
3. **Mail:** Mail or deliver the Agreement in a sealed envelope addressed to:

Richard Keyt
KEYTLaw, LLC
3001 East Camelback Road, Suite 130
Phoenix, Arizona 85016

CONFIRMATION FROM KEYTLAW ON RECEIVING THIS AGREEMENT & YOUR PAYMENT

When we receive this agreement and your payment, we will send you an email message confirming receipt. We usually send the confirmation email within a few hours if we receive it on a business day between 8 and 5 pm. If we receive your agreement and payment on a non-business day or after hours, we may not send a confirmation email until the next business day.

HOW TO PAY

1. **Preferred Method:** [Click on this link to go to our secure online store](#) and pay by Visa or MasterCard.
2. Mail or deliver your check payable to: **KEYTLaw, LLC** to the address above.
3. Call 602-906-4953, ext. 106 and give your credit card information to Richard Keyt's legal assistant Milena.