

**Request for Legal Services**

TO: Attorney \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_

FROM: Client Name(s) \_\_\_\_\_

RE: Estate Planning Consultation

DATE: \_\_\_\_\_

I/We are members of Heritage America and have consulted with my/our Heritage Representative regarding Estate Planning matters. After reviewing my/our circumstances, we believe that an additional consultation with you is appropriate at this time. I/We request your services, as evidenced by my/our signature at the bottom of this letter, to review our estate plan wishes for suitability and to draft the appropriate documents. Please call me/us so that I/we may discuss any matters yet to be resolved. I/We have enclosed a check for \$\_\_\_\_\_ to cover the cost of your services.

Here is my/our contact information:

Name(s): \_\_\_\_\_

Street Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Best Time to Call: \_\_\_\_\_

Heritage Representative: \_\_\_\_\_

Representative Phone: \_\_\_\_\_

Thank you for your attention to this matter. I/We look forward to speaking with you soon.

Sincerely,

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Client Signature