

Your Details (the “Gift Giver”):

Name
Address
Phone
Credit Card

Postal Code
Email
Exp CV

Recipient Details (the “Client”):

Name
Address
Phone

Postal Code
Email

Gift | Personalized Message to Recipient (optional)

Pricing | Packages:

Single Person

- Will \$550.00
- Will & Power of Attorney \$740.00
- Will, Power of Attorney & Medical Representation Agreement \$1015.00

Spousal (Couple)

- Will (x2) \$660.00
- Will & Power of Attorney (x2) \$910.00
- Will, Power of Attorney & Medical Representation Agreement (x2) \$1265.00

Note: For spouses, each spouse will have their own set of documents, but the documents are “mirror images” of each other. Exe. same persons chosen as executors, attorneys and beneficiaries. If spouses each have different wishes, additional charges apply.

In both cases, these are the standard rates for basic/simple documents. For example: the will-maker names executors, guardians, has simple funeral directions, general personal belongings distribution clause, and residue of the estate is distributed to the spouse. If both spouses pass away, the children (and possibly grandchildren) are alternate beneficiaries. Includes trust funds for minor children, if needed. If your needs are more complex, additional legal fees will apply.

From time to time, Client's circumstances may be such that they require more comprehensive legal documents or legal services. If this occurs, Fulton will discuss with the Client, and will provide to the Client an invoice for the additional work. The Client may then make arrangements to pay the excess cost themselves, or ask the Gift Giver to pay it. For privacy reasons, Fulton will not provide an invoice nor any details to the Gift Giver directly.

Terms & Conditions

You are referred to as the “Gift Giver”, Fulton & Company LLP is referred to as “Fulton”, the recipient is referred to as the “Client” and \$ (insert the cost of package selected here) is the “Gift Amount”.

I, the Gift Giver, acknowledge and agree to the following:

1. Services Fulton will Provide

Fulton will provide you with a printed 8x10” Gift Certificate and an optional Wills Questionnaire for the Client, plus informative handouts about estate planning.

Fulton.

2. The Payment Process

Upon receiving this completed form from the Gift Giver, Fulton will process payment of the Gift Amount on the credit card indicated. Fulton will open a Client file in the name of the Client, and hold the paid Gift Amount in our trust account, to the credit of the Client's file.

If the Gift Giver's credit card number changes or is renewed, it is the responsibility of the Gift Giver to provide Fulton with updated credit card information, in order that Fulton can process any refund.

3. Beginning Work

It is the responsibility of the Client to contact Fulton to initiate the legal work – Fulton will not be responsible for making the initial contact with the Client.

The Client must initiate the Legal work within 6 months of the date of this form. If this does not occur, Fulton may refund the full Gift Amount to the Gift Giver.

4. Refunds

The Gift Giver can request that Fulton refund the Gift Amount at any time prior to Fulton being retained by the Client to provide legal services. The determination of whether Fulton has been retained by the Client shall be made by Fulton, at its sole discretion. The Client may direct Fulton to apply the Gift Amount to any legal work done by Fulton.

If the total value of legal services provided by Fulton to the Client are less than the Gift Amount, Fulton will refund the difference to the Gift Giver upon completion of the legal work.

5. Your Rights and our relationship with you

You, the Gift Giver, acknowledges that even though you have paid for (part or all of) the legal work, you have not retained Fulton as your lawyer. You are not Fulton's client, and you have no rights nor ability to direct, intercede nor interfere with, our solicitor/client relationship with the Client.

Fulton owes a strict duty of confidentiality to the Client. This duty begins as soon as Fulton is retained by the Client. After that point, Fulton will not provide to the Gift Giver any information about the legal services provided to the Client. For example, Fulton cannot advise the Gift Giver of any of the following: whether the Client contacted Fulton, whether the Client's spouse contacted Fulton, how far along in the process are we, whether the documents been completed and signed, whom did the Client appoint in their documents etc. The exception to the foregoing is that Fulton will, if requested above, notify the Gift Giver that the Client has not contacted our office after 3 months.

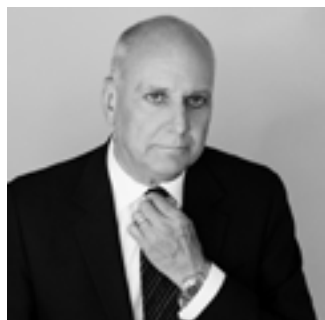
6. Should we contact you in 3 months, if the client has not contacted our office? Yes No

Please return the completed form via wills@fultonco.com or regular mail to our Kamloops office.

Questions? Contact a member of our experienced Estate Team:



Leah Card
lcard@fultonco.com



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