

Estate Plan/Trust/Membership Agreement - Authorization Disclosures & Receipt

Client #1 Name <i>(Please Print Clearly)</i>		Estate Plan/Trust Fee	Deed(s) Fees In State _____ \$75.00 Out of State _____ \$100.00	Total Collected
Client #2 Name <i>(Please Print Clearly)</i>		Legal Plan Fee*	E-Mail Address <i>(if applicable)</i>	
Street Address and/or P.O. Box		Payment Method <i>(Please select one)</i> Check Credit Card Money Order Cash	Credit Card Expiration Date	
City, State and Zip Code		Credit Card Type & Number <i>(Please check one)</i> <input type="checkbox"/> M/C <input type="checkbox"/> Visa <input type="checkbox"/> Amex <input type="checkbox"/> Discover #		
Home Phone <i>(Please include area code)</i>	Work Phone <i>(Please include area code)</i>	Arizona Realty and Law Representative Signature & date of event		

I/We the undersigned client(s), have today paid the Representative named above, as agent for Arizona Realty and Law and/or its subsidiaries the sum of \$ _____ which amount, after the three-day refund period described below, shall be an earned upon receipt retainer payment in full for the preparation of living trust documents and for the promise of availability in the future, without increase of quoted fee on my/our living trust estate plan; the undertaking to provide this service includes the preparation of a Customized Revocable Living Trust, may include but not limited to: a Declaration of Trust, Pour-over Will(s), Durable Power(s) of Attorney, Health Care Power(s) of Attorney, Nominations of Conservator(s) and/or Guardian(s), the preparation of documents for the transfer of assets from the purchaser's name into that of the Trust (*transfers do not include recording or filing fees*), and an Abstract or Certification of Trust and accompanying documents. Where appropriate under State law, an attorney will prepare, review and sign off on the Trust. The undersigned understand(s) that payment is earned upon acceptance in exchange for services, documents and advice, and in consideration of the fact that the amount of the payment is discounted from Arizona Realty and Trust's normal full fee for identical services and in consideration of our promise to be available to provide specific services into the future for that set fee amount. Client acknowledges, agrees and understands by initialing below, that the forms and paperwork necessary for completion of the Trust must be turned in within ninety days of the date of this receipt or fee will be forfeit.

_____ (initials)

The purchaser hereby acknowledges that the decisions to have this Trust prepared by Arizona Realty and Trust were made independently. The information given, or to be given by the purchaser, shall be complete, truthful and accurate. Arizona Realty and Trust is not liable for incorrect or incomplete information furnished by the purchaser. Purchaser acknowledges that it is the sole responsibility of the purchaser to sign their Trust Document and transfer their assets into the Trust. This transfer of assets from the purchaser to the purchaser's Trust is called "Funding the Trust." Purchaser further acknowledges and agrees that Arizona Realty and Trust, and/or an assigned legal plan attorney would prepare said Trust (based upon desires expressed and indicated). Purchaser authorizes Arizona Realty and Law to release information for the purposes of administration, notarial services, funding the purchaser's Living Trust, and estate and financial planning. The Arizona Realty and Trust representative that witnesses the signing of this receipt and agreement further acknowledges by his/her signature above, that he/she will not and has not given legal advice unless duly licensed by the State to do so.

For those who are married: It is customary for a husband and wife to employ the same lawyer, legal document preparer or law firm to assist in planning their estates. However, lawyers may not ethically represent multiple clients whose interests may conflict without their written consent. Before Arizona Realty and Trust and/or our plan attorney may represent both of you, we must advise you of the areas where a conflict may occur. Since we would represent both of you, each of you would be the attorney's client. If either of you discusses something with us (and/or an affiliated attorney), we would not be allowed to withhold that information from the other. You may have a difference of opinion concerning your proposed estate plan. Since we are acting for both of you, we would not be able to advocate one or the other of your positions, although we can point out the pros and cons of each opinion. And an actual conflict might arise that makes it impossible for us to perform our obligations to each of you. In that case, we would be forced to withdraw as your document preparer, requiring each of you to obtain a new document preparer. In addition to other matters, by signing this receipt each of you consents to having Arizona Realty and Trust and/or its affiliated attorney(s) represent both of you waiving any claim of Conflict of Interest, and you further agree that we may disclose anything to the other that is disclosed to us by either of you.

Disclosure of Notary and Delivery Representative Authorization: By determining to proceed with Arizona Realty and Trust, you will be asked to provide financial and other information necessary to the preparation of your living trust estate plan and for determination of whether a Living Trust is appropriate for you. If such estate plan is appropriate, the information will be used to prepare documents to carry out and assist in funding your estate plan. The information obtained from you in this process is confidential and cannot be revealed by Arizona Realty and Trust to anyone without your express permission. Arizona Realty and Trust has an ongoing arrangement with Delivery Representatives [the "Representative(s)"] for delivery of your completed documents for notarization. The Representatives are independent contractors who are notaries. Once your documents are completed, the Representative will bring you your estate planning documents and will witness and notarize your signatures. The Representative is not an employee of Arizona Realty and Trust, but is obligated to maintain confidentiality. If you have any questions concerning the documents or legal issues pertaining thereto you can call Arizona Realty and Trust anytime.

By my/our initials following this paragraph and signature(s) below, I/we acknowledge that I/we have completely read, understand, and agree with all elements and aspects of this paragraph entitled "Disclosure of Notary and Delivery Representative Authorization." _____ (initials)

Cancellation Policy: Your payment is a prepaid fee for services, which is earned upon receipt. However, you may cancel this transaction, without penalty or obligation, within three business days from the date of this receipt. To cancel this transaction, mail or deliver a signed and dated copy of this cancellation notice, or any other written notice, or send a telegram to our offices located at 5401 N. Oracle Rd. Tucson AZ 85704 not later than _____.

Client #1 *(Signature and date)*

Client #2 *(Signature and date)*