

Client Planning Fee Agreement

_____, client, hereby subscribes to this Family Business Renewal Agreement. Client agrees to pay fees as stated. All FBR planning fees are based on a formula that takes into account the complexity, size of family, asset values, number of organizations and the scope of the work to be completed. *A money-back guarantee, if not totally satisfied, is your assurance of FBR's quality renewal service.*

Phase I: Examining the Present Plan

Involves interviewing each individual family member and spouse, identifying family objectives, and analyzing the existing plan. Client agrees to provide any and all information required to accurately reflect current family, business and financial conditions. All information given will remain confidential. It will not be used for any purpose other than to develop the new plan. As facts and opinions are gathered, a complete portrait of the family, business and financial information will emerge.

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Phase II: Developing the FBR Process

Includes examining alternative transfer methods, seeking input from your advisors, and writing new plan. Client authorizes the FBR Wealth Transfer Specialist (Specialist) to contact client advisors to obtain all necessary information for the preparation of the written new plan.

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Phase III: Implementing the FBR Process

Includes presenting a written plan at a family retreat with all family members and spouses present. Candid discussions are facilitated by the FBR Specialist. Financial options are considered. The FBR Specialist, acting as facilitator, works with the client's trusted advisors to assure the implementation and tracking of the process in a timely manner.

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The FBR Specialist will not provide any tax or legal advice and will not prepare legal documents to implement any plan. Any implementation of the plan is the responsibility of the contracting client and his or her legal and tax advisors.

The parties recognize that financial plan projections are based on the information provided by client, assumptions of tax effects, and present economic conditions, all of which may fluctuate. Therefore, no warranties can be made that the client's goals will be reached. With regard to the services performed pursuant to the terms of this agreement, FBR Specialist will not be liable to client, or to anyone who may claim any right due to his or her relationship to the client, for any acts or omissions in the performance of said services except when said acts or omissions of the FBR Specialist are due to willful misconduct. Client shall hold the FBR Specialist free and harmless from any obligations or claims arising out of the FBR services.

Client:

FBR Specialist:

Signature

Signature

Name

Date

Name

Date