

# “I Just Need A Simple Will”

## *Engagement Letter and Disclaimer*

The “I Just Need A Simple Will” workshop is designed for simple estates. Those with more complex estates will need to engage an attorney to prepare a custom plan. In order to attend this Workshop, you must be able to truthfully initial the following statements. By attending Pippenger Hedberg LLC’s “I Just Need a Simple Will” workshop, you affirm the following:

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Email: \_\_\_\_\_

1. I am a resident of Colorado.
2. I fluently read, write and speak English and am capable for filling out paper work.
3. All Wills in Colorado go through the probate system. Planning to avoid probate is complex and expensive, and will not be covered in this Workshop.
4. This Workshop will *not* involve the creation of a Trust. The creation of a trust is also complex and expensive, and beyond the scope of this Workshop.
5. I understand that the law around same-sex couples is changing almost every legislative session. This area is too complex for this Workshop. There are several attorneys in the Denver area who specialize in same-sex couples (two of whom actually helped write the most recent laws), and Pippenger Hedberg LLC is happy to refer these attorneys as needed.
6. I understand this Workshop will not involve the creation of a gun or firearms trust.
7. I, and my spouse if I am married, have less than \$2,000,000 in assets (not including term life insurance).
8. I understand that, if I am not formally married, but am considered “common law married” because of reasons such as co-habitation, jointly filing taxes, or any other reason, the person I am common law married with may have rights that will trump the distributions outlined in my Will. Such rights will not be accounted for in the estate plan produced at this Workshop.

9. I understand that the other parent of my children (whether they are my spouse or not) has certain legal rights to the guardianship of my children which cannot be altered by my estate plan.
10. I understand that I will be preparing my Will and estate documents in the presence of other people. The environment will not be private. *As such, attorney-client privilege will not apply to anything said in the presence of other attendees of the Workshop.*
11. I will provide complete and honest information to Pippenger Hedberg LLC. I will not misrepresent facts or attempt to mislead Pippenger Hedberg LLC.
12. Pippenger Hedberg LLC shall have no responsibility for errors or omissions in the estate plan that occur because of information that was not provided to Pippenger Hedberg LLC.

All participants, please initial one of the following statements:

I am not currently married.

I am currently married and affirm the following:

- I understand that Pippenger Hedberg LLC will be representing both my spouse and I in the Workshop. This creates the potential for a conflict. I understand that (a) Pippenger Hedberg LLC will share any information I provide with my spouse, and (b) if my spouse and I cannot agree on certain terms or topics, Pippenger Hedberg LLC will be obligated to terminate the representation of both of us.
- If I pass away and my spouse is still living, I want all my property to go to my spouse.
- I understand that my spouse and I need to have identical Wills. Otherwise, if we die at the same time, an expensive and lengthy probate process will be necessary to determine which Will applies.
- I understand that, if I pass away first, my spouse will inherit all of my property and can change their Will in any way they want. I further understand that, this means my spouse can give the estate to his/her biological children, and exclude my biological children. In the opinion of Pippenger Hedberg LLC, this cannot be avoided except through the creation of a highly customized trust and postnuptial agreement. Creation of such a trust and post-nuptial agreement costs at least \$4,000 and will not be a part of this workshop.

If married, please initial one of the following statements:

- My spouse does not have any children.
- My spouse does not have any children, except for biological children with me.
- My spouse has children who are not my biological children or legally adopted children and I do not wish to disinherit any of my spouse's children.

All participants, please initial one of the following statements:

- I do not have children.
- I do not wish to disinherit any of my children.

If you are unable to truthfully complete the above sections, do not sign this form or attend the Workshop. By signing below you acknowledge that the representation by Pippenger Hedberg LLC is limited only to this Workshop. The representation will end at the conclusion of the Workshop, and is strictly limited to the documents produced in the Workshop.

I, \_\_\_\_\_ (print name), hereby affirm that I have read the foregoing statements, and truthfully initialed next to all that apply to me.

Signature: \_\_\_\_\_