

ESTATE PLANNING FIRM

123 Legal Plaza, Suite 100
Wealth City, ST 12345

PROFORMA INVOICE

Client:
[Client Name]
[Street Address]
[City, State, Zip]
Date: [Date]
Invoice #: [PRO-000]
Matter: Estate Portfolio Review

Description of Services / Planning Instruments	Qty/Hrs	Rate	Total
Last Will and Testament Preparation	1	\$0.00	\$0.00
Revocable Living Trust Drafting	1	\$0.00	\$0.00
Power of Attorney (Financial & Healthcare)	2	\$0.00	\$0.00
Asset Protection Consultation	0.0	\$0.00	\$0.00
Filing Fees & Administrative Disbursements	1	\$0.00	\$0.00
Subtotal: \$0.00			

Tax: \$0.00

Estimated Total: \$0.00

Note: This is a Proforma Invoice provided for financial planning purposes based on the initial consultation. Final costs may vary depending on the complexity of asset discovery and additional instrument requirements.

Payment is not required until the execution of the formal Engagement Letter.