



200 Towne Village Drive ♦ Cary, NC 27513 ♦ Phone: 919-467-4100 ♦ Fax: 919-467-8840

NEW CLIENT INFORMATION

In order to help us set up your file, please provide the basic information indicated below. *All information provided by client is attorney-client privileged and will be kept confidential unless waived by client, or attorney is required to disclose through rules of professional conduct.*

Today's Date: _____

Your Name: _____ Date of Birth: _____

Home Address: _____
Address City State Zip

Email Address: _____

Phone: Work _____ Cellular _____

Home _____ Other _____

Fax No. _____

OK to use this fax number without calling first? Y _____ N _____

Best way to reach you? _____

Brief description of the legal work you need to have done

How did you hear about McCuiston Law Offices, PLLC?

For Corporate & Tax Clients Only:

Social Security#: _____ Driver's License#: _____ State: _____

Company/Business Name: _____

If tax client, company FEIN: _____

Business Address: _____
Address City State Zip

[PLEASE SEE THE REVERSE SIDE OF THIS PAGE FOR INFORMATION REGARDING OUR FEE AGREEMENT]



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FEE AGREEMENT

The undersigned, _____, (hereinafter known as Client or Clients) hereby requests the legal services of McCuiston Law Offices, PLLC (hereinafter known as Attorney) for representation concerning _____.

Fixed Fee Matters: Attorney charges a prorated hourly rate for Client’s initial non-tax conference and a non prorated flat fee of \$400 for a tax conference up to one hour. In addition Attorney requires a deposit or retainer of one-half of the total fixed fee to be paid in advance. Such payments must be provided at the conclusion of the conference. The balance must be paid upon conclusion of your representation. Most matters (except tax disputes) can be resolved in less than 60 days. Drafts of your documents will be provided to you for your review within 2-4 weeks of your initial consultation. If you have not contacted us to sign your documents within such 60 day time period, we will invoice you for the remaining balance, and such remaining balance will be due upon receipt.

Hourly Fee Matters: In most cases (except for fixed fees matters such as estate planning and business formation), work is performed on an hourly basis at the following rates:

- W. Thomas McCuiston – Tax Consultations & Representation - \$400 per hour
- W. Thomas McCuiston – All other practice areas - \$350 per hour
- Associate Attorney - \$200 per hour
- Paralegal - \$170 per hour

Attorney W. Thomas McCuiston will use his discretion in staffing, to provide services in the most economical manner possible for Client. Unless Client is being billed a fixed fee, Client acknowledges that all time spent on his or her behalf in this matter, including time spent in telephone conversations, will be charged to Client. The initials of the person performing the services will be noted on the invoice. Client understands that many projects are open-ended, making it difficult to estimate the total actual cost. Except for matters expected to be of relatively short duration, you will typically be billed on a monthly basis.

As noted above, we will require a retainer (of an amount to be discussed during your initial conference) to be paid in advance. This retainer fee will be held by the Attorney in its trust account and shall be applied toward fees and costs incurred on behalf of Client by Attorney. Client understands that Attorney will transfer funds from their Trust account to a General account when earned and in the Attorney’s discretion to cover fees and costs as incurred on behalf of Client. When invoiced, Client will be required to replenish the retainer to the initially agreed upon amount. Should the entire retainer become depleted, Attorney will require replenishment of the entire retainer in order to be obligated to continue representation of Client. Upon conclusion of Client’s matter, any unused amounts remaining in Client’s trust account shall be refunded to Client.

By signing below, Client acknowledges that he/she has read and understands this Agreement and agrees to abide by the terms contained herein.

Client

Date

Client

Date

Thank you for this opportunity to be of service. A finance charge of 1.5% per month (18% per annum) will be charged on all accounts not paid within 30 days of the billing date. A \$30.00 service fee will be charged on any checks returned for insufficient funds.