



## Structured Fee Retainer Options

All plans are month-to-month. There are no long contracts. Client may terminate at any time, provided that, where applicable, the court consents.

The non-refundable retainer ensures that we hold time available to give service to our client. It also ensures that we do not take any new client that would have a conflict of interest with the current client unless the current client authorizes it, consents, and waives the conflict.

### **New Business Plan (Business within 12 months of formation):**

#### **\$100 per month**

- \$75 would be non-refundable retainer and goes directly to law firm, and \$25 would be stored to build retainer for additional legal services (essentially includes an extra \$300 per year for legal work through accumulated retainer)
- Includes:
  - one 30 minute telephone consultation with attorney per month\* (up to a \$200 value)
  - One standard contract review per year (up to a \$1,500 value)
    - If additional contracts are needed, the retainer may be used to go toward drafting of any additional contracts or it may be purchased at an additional flat fee rate or at an hourly rate
  - One time in-person meeting with attorney to learn about your business and how our firm can help your business grow (after 3 months) (up to a \$400 value and will help to grow your business)
  - \$300 per year in retainer that can be used toward additional legal services;
  - everything in excess is billed at our regular hourly rates
- **Value:** \$4,600 in standard legal fees, but you pay \$1200 per year
  - **Savings: \$3,400 per year**

### **Tier 1: Bronze**

#### **\$400 per month**

- \$300 would be non-refundable retainer and goes directly to law firm, and \$100 would be stored to build retainer for additional legal services (essentially includes an extra \$1,200 per year for legal work through accumulated retainer)
- Includes:
  - One 30 minute telephone consultation with attorney per month (up to a \$200 value)\*
  - One contract review per year (up to a \$1,500 value)
    - If additional contracts are needed, the retainer may be used to go toward drafting of any additional contracts or it may be purchased at an additional flat fee rate or at an hourly rate
  - one time in-person meeting with attorney to learn about your business and how our firm can help your business grow (after 3 months at this plan) (up to a \$400 value and will help grow your business)
  - \$1,200 per year in retainer that can be used toward additional legal services\*\*
  - Everything in excess is billed at our regular hourly rates
- **Value:** \$5,500 per year in standard legal fees, but you pay \$4,800 per year
  - **Savings \$700 per year (13% savings)**

## Tier 2: Silver

### \$750 per month

- \$600 would be non-refundable retainer and goes directly to law firm and \$150 would be stored to build retainer for additional legal services (essentially includes an extra \$1,800 per year for legal work through accumulated retainer and an extra 5% due to discount for legal work in excess of standard plan)
- Includes:
  - one 30 minute telephone consultation with attorney per month and \$400 per month of billable “flex” time\* (up to a \$600 value)
  - One contract review per year (up to a \$1500 value)
    - If additional contracts are needed, the retainer or flex time may be used to go toward drafting of any additional contracts or it may be purchased at an additional flat fee rate or at an hourly rate
  - Invitation to select client appreciation events;
  - Annual in-person meetings with attorney to learn about your business and how our firm can help your business grow (up to a \$400 value and will help grow your business);
  - \$1,800 per year in retainer that can be used toward additional legal services\*\*
  - everything in excess is billed at regular hourly rates with 5% discount
- **Value:** \$10,900 per year in standard legal fees, but you pay \$9,000 and receive 5% discount on all legal fees in excess of standard plan (the discount is where the real value lies in this plan)
  - **Savings \$1,900 per year (17% savings) and 5% on all legal services in excess**

## Tier 3: Gold

### \$1,500 per month

- \$1200 would be non-refundable retainer and goes directly to the law firm and \$300 would be stored to build retainer for additional legal services (essentially includes an extra \$3,600 per year for legal work through accumulated retainer and an extra 10% due to discount for legal work in excess of standard plan)
- Includes:
  - Two 30 minute telephone consultations with attorney per month and \$850 per month of billable “flex” time\* (up to a \$1250 value)
  - Two contract reviews or one standard contract creation for per year (up to a \$3,000 value)
    - If additional contracts are needed, the retainer or flex time may be used to go toward drafting of any additional contracts or it may be purchased at an additional flat fee rate or at an hourly rate
  - Invitation to annual banquet and any select client appreciation event
  - Semi-annual in-person meetings with attorney to learn about your business and how our firm can help your business grow (up to an \$800 value and it will help grow your revenue)
  - \$3,600 per year in retainer can be used toward additional legal services\*\*
  - Everything in excess is billed at regular hourly rates with 10% discount
- **Value:** \$22,400 per year in standard legal fees, but you only pay \$18,000
  - Savings of 4,400 per year (20% savings) and 10% savings on all legal services in excess

#### **Tier 4: Platinum**

##### **\$3,000 per month**

- \$2,000 would be non-refundable and goes directly to the law firm and \$1,000 would be stored to build retainer for additional legal services (essentially \$12,000 per year for legal work through accumulated retainer and an extra 20% due to discount due to legal work in excess of standard plan)
- **Includes:**
  - Two 30 minute telephone consultations with attorney per month and \$2,000 per month of billable “flex” time\* (up to a \$2,400 value)
  - Two contract reviews and one standard contract creation per year (up to a \$5,000 value)
    - If additional contracts are needed, the retainer or flex time may be used to go toward drafting of any additional contracts or it may be purchased at an additional flat fee rate or at an hourly rate
  - Waiver of one court filing fee per year (up to \$500 value per year);
  - Invitation to all firm events where clients are invited
  - Quarterly in-person meetings with attorney to learn about your business and how our firm can help your business grow (up to a \$1,600 value per year and it will help grow your revenue)
  - \$12,000 per year in retainer that can be used toward additional legal services\*\*
  - Everything in excess is billed at regular hourly rates with 20% discount
- **Value:** \$47,100 per year in standard legal fees, but you only pay \$36,000
  - **Savings of \$11,100 per year (24%) savings and 20% savings on all legal services in excess**

#### **Tier 5: Enterprise**

- Monthly fee based on case-by-case basis depending on the needs of the business
- 25% discount on regular hourly fees in excess of subscription
- All of the other benefits of Platinum Membership

#### **Retainer Plan:**

##### **Minimum of \$300 per month**

- \$150 nonrefundable retainer
- Anything in excess is stored in trust, and will be used toward necessary legal fees (no discounts apply)\*\*

**\*Monthly telephone consultations and “flex” time do not accumulate or bank. They must be used each month.**

**\*\*Regular retainers are held in trust and accumulate. They may be used at the client’s discretion, including withdrawn. Retainers are separate from nonrefundable retainers. Nonrefundable retainers are due to the firm immediately and are not refunded. Nonrefundable retainers are required to hold time for clients and due to opportunity cost to law firm because law firm will not be able to accept new clients who have a conflict of interest with current client without current client’s consent and waiver.**