

Client Engagement & Document Preparation Terms

Berman Weiss LLC provides structured, client-directed document preparation services in connection with estate planning, asset alignment, and administrative documentation. All documents are prepared based solely on client-provided information and instructions and are formatted for execution, recording, and institutional use.

The effectiveness of prepared documents depends upon proper execution, coordination, and implementation by the client. Berman Weiss LLC prepares documentation intended to support continuity of authority, private administration of assets, and alignment of ownership structures.

Client Acknowledgment

By proceeding, the client confirms that all information provided is accurate and complete, all instructions are given solely by the client, and that the preparation of documents is performed strictly in accordance with such direction. The client further acknowledges responsibility for all decisions relating to the execution, use, and implementation of prepared documents.

Trust Funding and Implementation

The effectiveness of a trust-based structure depends upon proper funding and alignment of assets. Assets not aligned with the trust may remain subject to probate.

Client Signature

Client Name: _____

Signature: _____

Date: _____

Notary Acknowledgment

Commonwealth of Massachusetts
County of Middlesex

On this ___ day of _____, 20___, before me, the undersigned notary public, personally appeared _____, and acknowledged execution of this document.

Notary Public: _____
My Commission Expires: _____

IMPORTANT DISCLOSURE: Berman Weiss LLC is not a law firm and does not provide legal advice, legal representation, or legal strategy. All services are administrative and performed strictly at the direction of the client. Clients are encouraged to seek independent legal counsel. Massachusetts Bar Association Lawyer Referral Service: (866) 627-7577.

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