



9155 E. Nichols Ave, Suite 175
 Centennial, CO 80112
 (303) 875-8730

**Divorce Financial Transitioning
 Service Agreement**

I/We, _____, hereby retain and employ A.M. Financial to provide financial analysis and planning in the matter of my/our divorce.

Service Fee Options: It is mutually agreed that I/we shall be charged for services at the rates set forth below (*select option A, B or C*):

Option A: Comprehensive Divorce Financial Transition Plan

<u>(Flat-Fee based on Marital Assets)</u>	<u>Fee</u>	<u>Select (x)</u>
0-\$500,000	\$1,000	_____
\$500,000-\$1,000,000	\$2,000	_____
\$1,000,000-\$3,000,000	\$2,750	_____
\$3,000,000 and up	\$3,500	_____
Additional: Court, Mediation, Arbitration or Hearing	\$150/hour	_____

Option B: Retainer/Hourly Services

	<u>Fee</u>
Initial Retainer	\$1,000
Consultation and Preparation	\$150/hour
Court, Mediation, Arbitration or Hearing	\$200/hour
Travel Time	\$50/hour
Administrative Tasks	\$50/hour

Option C: Separation Agreement Review

	<u>Fee</u>
Minimum Fee	\$300
Consultation and Analysis	\$150/hour

Payment: If this agreement is entered by two parties, it is understood that both parties are equally and fully responsible for payments due until such time the account is paid in full.

(Option A): All flat fee services shall be paid in advance. A minimum \$300 is due in advance for any additional court, mediation, arbitration or hearing costs associated with a flat fee service option. Any additional charges derived from court, mediation, arbitration or hearing services are due at the end each session.

(Option B): All retainer/hourly services provided shall be charged against the initial retainer outlined above until the retainer is exhausted. I/we understand that the retainer may not pay all the fees and costs necessary to complete the consultation. Should the initial retainer be consumed, A.M. Financial may require additional retainers in an amount deemed to be appropriate. Any part of the retainer that is not used will be refunded.

I/We agree that any remaining charges above the retainer will be due and payable in full within 30 days of the final invoice. In the event of a delay in final court orders, I/We agree to bring the account current within 30 days of being invoiced. Any remaining balance not paid within 30 days will be assessed interest at the annual rate of 15%, assessed monthly.

(Option C): Minimum fee shall be paid in advance. Any additional hourly fees incurred above the minimum fee will be due and payable in full within 30 days of invoice. Any remaining balance not paid within 30 days will be assessed interest at the annual rate of 15%, assessed monthly.

Confidentiality and Restrictions: I/We understand and agree to the following service model regarding confidentiality and applicable restrictions during and after the scope of this agreement:

Financial Neutral

A.M. Financial will act as a financial neutral therefore any documents and information provided by one spouse may be shared with the other spouse. It is understood that to prevent any conflicts of interests between spouses, that at such time this service agreement ends no additional services may be rendered by either spouse in relationship to the assigned service provider through WealthSource Partners.

Financial Advocate

A.M. Financial will act as a financial advocate therefore all client provided documents and information will remain confidential. At such time this service agreement ends the client is free to render services from any financial professional including assigned service provider through WealthSource Partners for any financial planning or asset management needs (reference the Conflict of Interest document provided for more information).

Obligation to Provide Accurate Data: I/We agree to provide A.M. Financial with accurate, reliable, and complete financial statements and information. I/We understand A.M. Financial will rely exclusively on such information provided. Consequently, I/We agree I/We will not hold A.M. Financial or its affiliates accountable for any errors or omissions in their work product resulting from my/our failure to provide accurate, reliable, and complete financial information.

Services Provided: A.M. Financial provides supporting financial information, evaluation and analysis to be utilized by the client and the client's selected attorney if directed, during the process of their divorce. Services provided in regards to this agreement are solely fee-only and do not involve investment or security advice or insurance transactions. All information is financial in nature and should not be construed or relied upon as legal or tax advice. **A.M. Financial IS NOT AN ATTORNEY AND DOES NOT PROVIDE LEGAL OR TAX ADVICE.** Individuals are encouraged to seek competent legal and tax advice from professionals who specialize in divorce and tax laws in their respective state.

Conflict of Interest Disclosure: I/We certify that a copy of the Conflict of Interest Disclosure explaining the relationship between A.M. Financial and WealthSource Partners has been received.

SIGNATURE INDICATES THE ABOVE HAS BEEN READ AND AGREED TO:

Client

Client

____/____/_____
Date

____/____/_____
Date

Amy Mahlen on behalf of A.M. Financial

____/____/_____
Date