

# *Client Bill of Rights*

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*As your advisor, I agree to do the following:*

1. Provide considerate and respectful advisory services.
2. Only work on your behalf if I have the skills, knowledge and experience necessary to provide excellent services.
3. "Tell it like it is." To be open and honest with you in all transactions.
4. To act on your behalf in the most dignified manner possible and conform to all legal and ethical guidelines.
5. Communicate. That means I will be an active listener, return phone calls as soon as possible, and provide regular case status updates.
6. Work on your matter in a timely manner so that it may be resolved as expeditiously as possible, with as little conflict as possible.
7. Place all fee agreements in writing.
8. Bill you fairly only for actual time, fees, and costs incurred and to provide detailed billing statements.
9. Obtain your written authorization before negotiating a settlement or other form of resolution to any dispute.
10. Preserve your confidences, honor your privacy, and only disclose the facts of your case, or other matters, to persons on a 'need-to-know' basis.
11. Remain current on the laws and managements trends related to your business.
12. Properly maintain all financial books and records related to your matter and account, including billing statements, cost ledgers and liens, etc.
13. To promptly refund any unearned fees or retainers.
14. Maintain and store your records in a place which is secure from theft and unnecessary access, and which is protected against the possibilities of fire, water damage, and the like.
15. To promptly release client files upon demand.
16. *Additional Request(s) by the Client:*

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*Date:* \_\_\_\_\_

*Advisor's Signature:* \_\_\_\_\_

*Date:* \_\_\_\_\_

*Client's Signature:* \_\_\_\_\_