



## TRANSFER OF MEMBERSHIP INTEREST TESTAMENT PREPARATION SERVICE AGREEMENT



Use this Agreement to hire Arizona LLC and estate planning attorney Richard Keyt and KEYTLaw, L.L.C. (collectively the "Firm") to prepare a Transfer of Membership Interest Testament for \$247 that will transfer your entire membership interest in one or more Arizona limited liability companies to your heir(s) named in the Testament on your death and allow your heir(s) to avoid a costly, time-consuming and public probate in a Superior Court.

Richard ("Rick") Keyt, a former partner in one of the largest law firms in Arizona, has practiced law and been forming entities in Arizona since 1980. After law school Rick obtained a masters degree (LL.M.) in federal income tax law from New York University School of Law. For information about the Firm, see [www.keytlaw.com](http://www.keytlaw.com) and Rick's [biography](#). For information about Arizona wills, trusts and estate planning, including fees for comprehensive estate plans, see Richard Keyt's Arizona Estate Planning Library. If you have questions about the Transfer of Membership Interest Testament or this Agreement, call Rick or KEYTLaw attorney Abby Neal at 602-906-4953 (no charge).

A Transfer of Membership Interest Testament that is properly signed, witnessed by two disinterested witnesses and notarized will transfer ownership of the membership interests in the Arizona limited liability companies named in the document on the death of the member to the heirs named in the Transfer of Membership Interest Testament.

### ARIZONA LLC TRANSFER OF MEMBERSHIP INTEREST TESTAMENT PREPARATION SERVICE

You, the undersigned owner of the Arizona limited liability company membership interest(s) described in this Agreement, are hiring Arizona estate planning attorney Richard Keyt to prepare the following custom drafted legal documents for you:

1. **Arizona Transfer of Membership Interest Testament:** We email an Adobe .pdf version of this document to you to be signed, witnessed and acknowledged before a notary public.
2. **Letter of Explanation from Richard Keyt:** This letter explains your Arizona Transfer of Membership Interest Testament.
3. **How to Sign Your Transfer of Membership Interest Testament and How it Must be Witnessed and Notarized:** Detailed instructions on how to sign, witness and notarize your Arizona Transfer of Membership Interest Testament.

We require payment in advance before we will prepare your Transfer of Membership Interest Testament and related documents. The fee for the services you select on the next page will be the only amount you pay us. We will send you an itemized invoice. You agree to pay any unpaid amount within ten days after we mail the invoice. If you do not pay an invoice within thirty days, we may charge interest on unpaid amounts at the rate of 1.5% per month, and we may terminate our services and/or withdraw from further representation of the company. The entire amount you pay KEYTLaw, LLC, and Richard Keyt for fees and costs is nonrefundable, but you may nevertheless discharge KEYTLaw, LLC, and Richard Keyt at any time and in that event you may be entitled to a refund of all or part of the fee based upon the value of the representation.

We are not acting as your attorney in advising you with respect to this Agreement because we would have a conflict of interest in doing so. If we prepare one or more Transfer of Membership Interest Testaments for you, the Firm will not represent you with respect to any other legal matter unless you and the Firm, sign a mutually acceptable engagement Agreement that sets forth any additional services to be provided and the fees to be charged. We are being hired to provide legal services in connection with a specific matter. After completion of the matter for which we were engaged, changes may occur in laws or regulations that are applicable to you that could have an impact upon your future rights and liabilities. We do not have any continuing obligation to advise you with respect to future legal developments concerning Arizona Transfer of Membership Interest Testaments or anything related to the transfer of membership interests in an Arizona limited liability company on death. In preparing a Transfer of Membership Interest Testament and related documents, we represent only the person who signs this Agreement, not any prospective heir. If for any reason, the Firm cannot prepare your requested Arizona Transfer of Membership Interest Testament, we will notify you and refund any money you paid.

## SELECT YOUR DESIRED SERVICES & GUARANTEED FIXED FEE

Click your mouse on the boxes below to select your services and fees. Fill in the blanks online by clicking on a box or by typing the information in each blank space. Push the **TAB** key to move to the next field and the **SHIFT + TAB** key to move backwards.

- \$247 **Prepare one Transfer of Membership Interest Testament:** We will prepare a Transfer of Membership Interest Testament and the other documents listed on page one using our normal processing time of approximately two weeks. We will deliver all of your documents to you in digital format as Adobe pdf files attached to an email sent to the email address you list below.
- \$100 **Prepare a Second Transfer of Membership Interest Testament for Your Spouse:** We will prepare a second Transfer of Membership Interest Testament and the other documents listed on page one. This price applies only if we are hired to prepare the document for the LLC owner's spouse. Each spouse must complete and sign separate versions of this Agreement.
- \$ 49 **Hard (Paper) Copies of All of Your Deed & Related Documents:** Check this box you if want us to mail paper versions of your documents to you instead of digital documents attached to an email. We charge for the extra staff time and postage.
- \$200 **One Business Day Expedited Service** to prepare your Transfer of Membership Interest.
- \$100 **Three Business Day Expedited Service** to prepare your Transfer of Membership Interest.
- \$147 **Signing, Witnesses & Notary Service.** Arrange a time to come to the KEYTLaw office at 3001 East Camelback Road, Suite 130, Phoenix, AZ, to sign your Transfer of Membership Interest Testament. We provide the witnesses and the notary.
- \$\_\_\_ Total amount to be paid to KEYTLaw, LLC.

## TRANSFER OF MEMBERSHIP INTEREST TESTAMENT INFORMATION

The information requested below is needed to prepare your Transfer of Membership Interest Testament. **ANSWER ALL QUESTIONS.** We prepare the Transfer of Membership Interest Testament using the information contained in your answers below. You represent and warrant that all information in this Agreement will be correct. If you are printing with a pen, please print (no cursive) nicely so we can read what you print. Type the answers to the questions directly in each blank space. Press your **TAB** key to move to the next field in the form. Press **SHIFT + TAB** keys to move backwards.

### 1. Name of LLC

Owner:

\_\_\_\_\_  
Full name of the owner/member for whom we are preparing the Transfer of Membership Interest Testament

### 2. Owner's Mailing

Address:

\_\_\_\_\_  
Street Address                      City,                      State                      Zip Code

### 3. Owner's Telephone & Email:

\_\_\_\_\_  
Primary Voice Phone

\_\_\_\_\_  
Email address

### 4. Name(s) of Your LLCs:

In the blank space below, list the exact name on file with the Arizona Corporation Commission of each Arizona LLC in which you have an ownership interest and that you want to transfer to your heirs on your death by the Transfer of Membership Interest Testament.

**5. Your Heirs:**

Who will inherit your membership interest(s) in the above-listed LLC(s) on your death. **Note:** If you have multiple heirs they will take title as equal tenants in common.

**My Heir or Heirs is/are** (check only one of the following 6 boxes):

- My spouse, but if he/she dies before me or we divorce, then all of my children  
Spouse's name: \_\_\_\_\_
- My spouse, but if he/she dies before me or we divorce, then the heirs named below
- My spouse even if we divorce, but if he/she dies before me, then all of my children
- My spouse even if we divorce, but if he/she dies before me, then the heirs named below
- All of my children
- Equally to the person / people / entity / entities / trust(s) named below

Legal Name(s) of Heir(s)	Relationship to Owner
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Consequences of a Prospective Heir Dying before You, the Owner of the LLCs**

If a prospective heir named above dies before you, the owner of the LLC membership interest(s), what do you want to happen to the gift that would have gone to the deceased prospective heir?

- 1. The gift that would have gone to the deceased heir goes instead equally to the other living heirs named above (not to the descendants of the deceased heir).
- 2. The gift that would have gone to the deceased heir goes instead equally to the living descendants of the deceased heir per stirpes.

**6. Other Information:**

**If there is anything you want KEYTLaw to know, type or print it in the field below.**

## SIGNATURE

The Firm will not prepare your Transfer of Membership Interest Testament and related documents unless: (i) the owner of the membership interests in the LLCs listed in item 4 above signs this Agreement, and (ii) you pay in advance the entire cost for the documents and services that you order. **NOTE:** By signing below, you instruct and authorize the Firm to email your documents to the above email address shown in item 3 above as Adobe pdf files attached to an email message.

If you have any questions about this Agreement or any of the documents or services in this Agreement, call KEYTLaw LLC and estate planning attorney Abby Neal at 602-906-4953, ext. 5.

### THE OWNER OF THE LLC(S) MUST SIGN THIS AGREEMENT OR WE CANNOT PREPARE THE DOCUMENTS

\_\_\_\_\_  
Signature of LLC Owner

KEYTLaw, L.L.C., an Arizona limited liability company

\_\_\_\_\_  
Print Name of Owner

By: \_\_\_\_\_

Its: \_\_\_\_\_

### HOW TO DELIVER THIS AGREEMENT TO KEYTLAW

#### SIGN THIS AGREEMENT BEFORE FAXING, MAILING, EMAILING OR DELIVERING IT TO RICHARD KEYT.

1. **Fax:** Fax this Agreement directly to KEYTLaw attorney Abby Neal at 602-926-8985. You do not need a cover sheet.
2. **Email:** After the owner of the LLCs signs this Agreement, scan it and send it to KEYTLaw attorney Abby Neal as an attachment to an email message addressed to [asn@keytlaw.com](mailto:asn@keytlaw.com).
3. **Mail:** Mail or deliver the Agreement in a sealed envelope addressed to:

Abby Neal  
KEYTLaw, LLC  
3001 East Camelback Road, Suite 130  
Phoenix, Arizona 85016

### CONFIRMATION FROM KEYTLAW ON RECEIVING THIS AGREEMENT & YOUR PAYMENT

When we receive this Agreement and your payment, we will send you an email message confirming receipt. We usually send the confirmation email within a few hours if we receive it on a business day between 8 and 5 pm. If we receive your Agreement and payment on a non-business day or after hours, we may not send a confirmation email until the next business day.

### HOW TO PAY

1. **Preferred Method:** [Click on this link to go to our secure online store](#) and pay by Visa or MasterCard.
2. Mail or deliver your check payable to: **KEYTLaw, LLC** to the address above.
3. Call 602-424-4159 and give your credit card information to KEYTLaw legal assistant Milena.