H&M

Hale & Mercer

ATTORNEYS AT LAW · LLP

Established 1987 · Richmond, Virginia

February 18, 2026

Ms. Margaret A. Cullen
418 Canopy Row
Richmond, Virginia 23220

Re: Engagement confirmed — estate plan and trust funding review

Dear Ms. Cullen:

Thank you for trusting Hale & Mercer with your estate plan. This letter confirms our engagement following Tuesday's consultation and sets out the scope, fee, and calendar in plain terms, so you know precisely what we will do and when you may expect it.

We will prepare a revocable living trust, pour-over will, financial power of attorney, and advance medical directive; review the deed and beneficiary designations you brought to the meeting; and prepare the initial funding memorandum for your investment and bank accounts. If a new deed to Canopy Row is advisable, we will draft and record it as part of this engagement.

The fee for the work described above is a flat **$2,850**. Your $250 consultation fee is credited against that amount. The balance is not due until the signing appointment. Recording fees and any out-of-scope work — for example, a separate business succession plan — would be discussed and approved in writing before any additional charge is incurred.

We expect to deliver first drafts within two weeks of receiving the asset list enclosed with this letter. Once you have reviewed them, we will revise at your pace and reserve the conference room for a formal signing during the week of March 16. Documents will be read aloud, witnessed, and notarized here; you will leave with a bound copy, and the firm will retain the executed originals in the vault unless you direct otherwise.

Please countersign the enclosed copy where flagged and return it in the enclosed envelope. Nothing in that return creates urgency or obligation beyond the engagement described here; it simply makes the scope unmistakable before we begin drafting.

It was a pleasure to meet you and your daughter. We will treat the work with the same care you have plainly given the family records.

Very truly yours,

Eleanor V. Hale

FOUNDING PARTNER

EVH/mc · Enclosures: engagement copy, asset checklist, return envelope
cc: James R. Mercer (file copy only)

ELEANOR V. HALE · JAMES R. MERCER · THOMAS W. ALDEN · AMARA N. OSEI

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Hale & Mercer LLP
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Richmond, Virginia 23219
ATTORNEYS AT LAW

FIRST-CLASS
POSTAGE

DELIVER TO

Margaret A. Cullen
418 Canopy Row
Richmond, VA 23220

PRODUCTION NOTES

A quiet letterhead, built *to be used.*

HALE & MERCER LLP
SUITE / LETTERHEAD + NO.10
COLOR / CREAM · GREEN · GOLD
UNITS / INCHES + POINTS

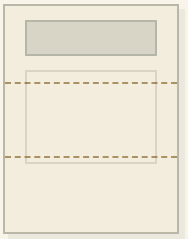
The suite is intentionally restrained: the firm's mark does the ceremonial work at the top of the sheet, then gets out of the way so a real business letter can breathe.

I. Why the masthead sits high

An 11-inch sheet folded in thirds breaks at **3⅔ in** and **7⅓ in** from the top edge. The masthead lives entirely inside the first 1.48 in: monogram at 0.43 in, rule at 1.48 in, and the first typed line at 1.84 in. When the letter is folded for a No. 10 envelope, the firm name stays on the top panel rather than being cracked by a fold.

MARGIN MAP / TOP 0.43 · FIRST TYPE 1.84 · LEFT 0.96 · RIGHT 0.90 · FOOTER CLEAR 0.38

FOLD / MARGIN DIAGRAM



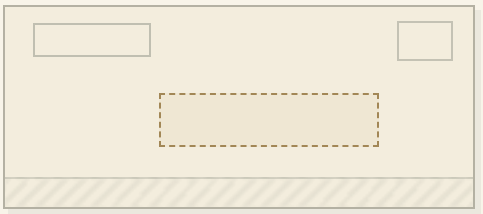
- **1.48 in** — masthead rule
- **1.84 in** — first typed line
- **3⅔ in** — first third-fold
- **7⅓ in** — second third-fold
- **9.95 in** — typing floor

II. Safe typing margins

The typing measure is 6.64 in wide — generous, but not a full-width legal document. Keep correspondence inside the same left and right margins as the sample. The foot ledger begins low enough that a second page can use a simpler continuation sheet with a 1 in top margin.

DO NOT TYPE BELOW 9.95 IN FROM TOP / HOLD 0.25 IN CLEAR OF EITHER THIRD-FOLD WHEN REVISING LONG LETTERS

ENVELOPE CLEAR ZONES



- upper-left / return address
- upper-right / postage keep-clear
- dashed / preferred recipient field
- hatched / 0.625 in barcode clear zone

III. Type sizes, in points

LH-01	Firm name, Cormorant Garamond semibold	21 / 21
LH-02	Attorneys-at-law small caps, Libre Franklin	5.8 + .32em
LH-03	Letter body, date, address, and close	8.9 / 13.2
LH-04	Signature, Cormorant italic	16 / 17.6
LH-05	Footer ledger and attorney line	5.5–5.9
EN-01	Recipient address, Libre Franklin medium	10.2 / 15.5
EN-02	Recipient name, Cormorant semibold	15 / 16.8

INK NOTE

- green appears only in type and rules — no heavy floods
- gold is a hairline accent; never a fill behind text
- cream paper carries the warmth, so the piece reproduces cleanly in one or two colors

IV. Postal-safe envelope zones

The recipient block is centered optically on the face and kept above the bottom barcode clear zone. As a conservative production rule, keep all printing out of the lower **⅝ in**, keep the address at least **½ in** from the right edge, and leave the upper-right postage box unobstructed. The return address stays small and high in the conventional upper-left corner.

NO WINDOW · NO BLEED · ADDRESS INK #24271F · RULE STOPS ABOVE CLEAR ZONE

PAPER RECOMMENDATION

32 lb / 120 gsm warm-white eggshell writing for the sheet; matching 70 lb text No. 10 envelope. Uncoated, no gloss, no bright blue-white stock.