

Direct Client Engagement Agreement

Direct Client Professional Services Engagement

Prepared by Sepi Miller, CDRE®

Pennsylvania Divorce Real Estate Expert

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DRAFT PROFESSIONAL RESOURCE - REVIEW BY PENNSYLVANIA COUNSEL BEFORE PUBLICATION OR USE

Purpose and Use

Defines terms when an individual client directly retains Sepi for Pennsylvania divorce real estate consulting or Property Concierge services.

Version 1.0 | Last updated August 2026

Client and Matter Information

CLIENT NAME

ATTORNEY, IF ANY

MATTER / CASE

EFFECTIVE DATE

PROPERTY ADDRESS

EMAIL

PHONE

PREFERRED CONTACT METHOD

Services Selected

- | | |
|--|---|
| ☐ Initial consultation | ☐ Property evaluation / strategy |
| ☐ Buyout / options analysis | ☐ Marketability assessment |
| ☐ Property Concierge / Ready-to-Sell™ | ☐ Vendor coordination |
| ☐ Professional staging | ☐ Relocation / community analysis |
| ☐ Litigation support - separate scope | ☐ Expert witness - separate engagement |
| ☐ Listing / sale - separate brokerage agreement | ☐ Other |

ADDITIONAL SCOPE / NOTES

Professional Terms

Professional Role and Scope

Sepi Miller, CDRE® (Consultant) provides only the services identified in the accepted matter-specific scope. Services may include divorce real estate consultation, property and market analysis, buyout or sale-option analysis, litigation support, expert witness services, relocation and community analysis, Property Concierge coordination, Ready-to-Sell™ planning, and transaction management under separate brokerage documents when applicable.

Professional Independence

Consultant will exercise independent professional judgment. Compensation is not contingent on a favorable opinion, testimony, settlement, sale price, or litigation outcome. Consultant may revise an opinion if reliable new information or materially changed market conditions require it.

Pennsylvania Professional Boundaries

Consultant does not provide legal, tax, accounting, financial-planning, engineering, inspection, psychological, or formal appraisal services unless separately licensed and expressly retained for that regulated service. Pennsylvania brokerage services require separate brokerage documents, agency disclosures, and broker approval when applicable.

Information and Cooperation

The retaining party will provide complete and timely information, court orders, deadlines, access details, safety information, and material updates. Consultant may rely on information reasonably supplied by counsel, parties, public records, market sources, and authorized professionals.

Confidentiality and Records

Non-public information will be handled with reasonable care, subject to authorized disclosure, lawful subpoena or court order, professional duties, and disclosures reasonably necessary to perform the engagement. Nothing in this agreement creates or waives attorney-client privilege or work-product protection.

Fees, Retainers, and Expenses

Fees are governed by a separately approved Professional Fee Schedule or written matter proposal. Consultant may require an advance retainer and replenishment. Authorized travel, records, printing, shipping, photography, and third-party expenses may be billed or reimbursed.

Property Concierge and Vendors

Third-party vendors are independent businesses responsible for their own contracts, licensing, insurance, permits, pricing, scheduling, workmanship, and performance. Consultant coordinates only within the written scope and does not guarantee vendor performance.

Intellectual Property

Consultant retains ownership of The Sepi Miller Divorce Property Solutions™ System, The Sepi Miller Method™, Attorney Toolbox™, Ready-to-Sell™ Program, templates, methods, checklists, and pre-existing educational materials. Matter-specific work may be used for the matter for which it was prepared.

Term, Withdrawal, and Governing Law

Either party may terminate in writing, subject to earned fees, approved expenses, confidentiality, intellectual-property rights, and other surviving obligations. Consultant may withdraw for conflicts, safety concerns, nonpayment, noncooperation, impaired neutrality, or professional obligations. Pennsylvania law governs unless a signed matter-specific agreement lawfully provides otherwise.

Electronic Records

Electronic records and signatures may be used only when authorized by the parties and applicable law. The website should preserve consent, signer identity, date and time, the exact accepted version, and an accessible copy for each signer.

Fees and Signatures

INITIAL RETAINER

RESPONSIBLE PAYER

BILLING EMAIL

SPECIAL FEE TERMS

Client

TYPED SIGNATURE / ELECTRONIC SIGNATURE

PRINTED NAME / TITLE

DATE

Sepi Miller, CDRE®

TYPED SIGNATURE / ELECTRONIC SIGNATURE

PRINTED NAME / TITLE

DATE