

## ESTATE PLANNING FEE SCHEDULE

### Base/Standard Estate Planning

Base or Standard Estate Planning provides solid basic planning for people who do not need personal, detailed wishes for care during their lifetime, additional authority and instructions to agents, lifetime asset protection for spouse and/or children or remarriage protection. A Base or Standard plan includes outright distributions and trusts for minor or disabled beneficiaries.

#### Our **Will Plan** includes:

- Will with outright distributions, testamentary trusts for minor or disabled beneficiaries
- Financial Power of Attorney with additional powers
- Health Care Power of Attorney with living will powers

Single	Married
\$650	\$950

Annual Maintenance	
Maintenance only Single/Married	Maintenance & Fee Guarantee Single/Married

\$250
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#### Our **Revocable Living Trust Plan** includes:

- Wills that pour over into your trust
- Revocable Living Trust with disability provisions for control and outright distributions at death, standby trusts for minor or disabled beneficiaries
- Financial Power of Attorney with additional powers
- Health Care Power of Attorney with living will powers

Single	Married
\$2,800	\$3,250

\$360/540	\$460/640
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#### Our **Standard Asset Protection Plan (AP1)** includes:

- Wills that pour over into your trust
- Irrevocable Asset Protection Trust with disability provisions for control and outright distributions at death, standby trusts for minor or disabled beneficiaries
- Financial Power of Attorney with additional powers
- Health Care Power of Attorney with living will powers

Single	Married
\$3,800	\$4,200

\$360/540	\$460/640
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#### Our **Standard Asset Protection Plan (AP2)** includes:

- Wills that pour over into your trust
- Revocable Living Trust with disability provisions for control and outright distributions at death, standby trusts for minor or disabled beneficiaries
- Irrevocable Asset Protection Trust
- Financial Power of Attorney with additional powers
- Health Care Power of Attorney with living will powers

Single	Married
\$4,800	\$5,200

\$360/540	\$460/640
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## ESTATE PLANNING FEE SCHEDULE

### Enhanced/Personalized Estate Planning

Enhanced or Personalized Estate Planning includes personal, detailed wishes for care during your lifetime, additional authority and instructions to agents, lifetime asset protection for spouse and/or children and remarriage protection or sub-trusts for minor or disabled beneficiaries.

#### Our **Will Plan** includes:

- Will with testamentary trusts for disabled or minor beneficiaries and lifetime asset protection for spouse and/or children
- Financial Power of Attorney (expansive with instructions)
- Health Care Power of Attorney
- Personal Care Plan (Living Will)

Single	Married
\$1,350	\$1,620

Annual Maintenance	
Maintenance only Single/Married	Maintenance & Fee Guarantee Single/Married

\$250

#### Our **Revocable Living Trust Plan** includes:

- Wills that pour over into your trust
- Revocable Living Trust with standby trusts for disabled or minor beneficiaries and lifetime asset protection for spouse and/or children
- Financial Power of Attorney (expansive with instructions)
- Health Care Power of Attorney
- Personal Care Plan (Living Will)

Single	Married
\$3,660	\$4,060

\$360/540    \$460/640

#### Our **Standard Asset Protection Plan (AP1)** includes:

- Wills that pour over into your trust
- Irrevocable Asset Protection Trust with standby trusts for disabled or minor beneficiaries and lifetime asset protection for spouse and/or children
- Financial Power of Attorney (expansive with instructions)
- Health Care Power of Attorney
- Personal Care Plan (Living Will)

Single	Married
\$5,100	\$5,550

\$360/540    \$460/640

#### Our **Standard Asset Protection Plan (AP2)** includes:

- Wills that pour over into your trust
- Revocable Living Trust with standby trusts for disabled or minor beneficiaries and lifetime asset protection to spouse and/or children
- Irrevocable Asset Protection Trust
- Financial Power of Attorney (expansive with instructions)
- Health Care Power of Attorney
- Personal Care Plan (Living Will)

Single	Married
\$6,750	\$7,250

\$360/540    \$460/640

## ESTATE PLANNING FEE SCHEDULE

### Special Needs Planning

- First-Party Special Needs Trust \$2,500
- Court-Approved First-Party Special Needs Trust \$3,500
- Third-Party Special Needs Trust \$3,500
- Care Plan or Caregiver Agreement \$1,500

### Probate

- Full Estate Probate \$1,800 minimum or 3% of estate
- Small Estate Probate \$2,500
- Affidavits of Heirship \$ 500

### Trust Administration

- Administration/Accounting \$2,100 minimum Or 3% of estate  
1% cap for fee guarantee members
- Small Estate Administration/Accounting \$2,500
- Affidavits of Heirship \$ 500

### Medicaid

- Medicaid Application \$6,000
- Medicaid Spend Down \$1,500
- Qualified Income Trust \$ 500
- Deed with Reserved Life Use \$ 500
- Pooled Trust \$1,200
- Fair Hearing \$3,200
- Recertification \$ 800

### Miscellaneous

- Deeds \$ 250 Plus Recording Fee
- Non-Maintenance Reviews \$ 300 Minimum
- Expedited Fee \$ 400 or 10% of regular fee – greater amount
- Irrevocable Life Insurance Trust \$5,000
- Powers of Attorney \$ 150 each