



ESTIMATED FLAT FEE PROTECTION AND INVESTMENT LEVELS

\$150 consultation fee/per half hour

	The Essentials Plan	The Essentials Kid Protection Plan	Revocable Trust Planning
	Simple Will-Based Estate Package	Will/Trust-Based Estate Package with Child Protection	Probate Avoidance and Privacy Trust-Based Package
Best for:	<ul style="list-style-type: none"> ▪ Grown children or no children. 	<ul style="list-style-type: none"> ▪ Minor children ▪ Concerned with children obtaining total inheritance at 18 ▪ Concerned with spouse remarrying and/or overspending 	<ul style="list-style-type: none"> ▪ Probate Avoidance ▪ Privacy of Estate ▪ Minor children ▪ Own out of state properties ▪ Seamless transition ▪ Over 55 years of age
Single	\$900	\$1,000.00	\$2,900-\$3,500
Married (must retain attorney at same time)	\$1,050 (Only \$150.00 more for spouse)	\$1,450.00 per couple (Only \$450.00 more for spouse)	\$3,000-4,000 per couple
Includes:	<p>Estate Planning Portfolio which holds:</p> <ul style="list-style-type: none"> ▪ Durable Power of Attorney (2) ▪ Health Care Surrogate (2) <ul style="list-style-type: none"> ▪ Living Will (2) ▪ Preneed Guardian (2) ▪ HIPAA Authorization (2) ▪ Last Will and Testament (2) <p>Also,</p> <ul style="list-style-type: none"> ▪ Follow up letters including with Beneficiary Designation Instructions ▪ Final Arrangements Worksheet ▪ Final Arrangements Authorization ▪ Electronic Copies of all documents 	<p>All documents from Essentials level, plus:</p> <ul style="list-style-type: none"> ▪ Name Guardian for Children (2) ▪ Power of Attorney for Minor (1) ▪ Medical Power of Attorney for Minor (1) ▪ Last Will and Testament (2) <ul style="list-style-type: none"> ▪ Option to add trust for spouse (starts +200) ▪ Option to add testamentary trust for your children (base included, custom language starts +200) ▪ Emergency Protocol and Phone Tree ▪ Deed, if needed, (additional charge) 	<p>All documents from Essentials level, plus:</p> <ul style="list-style-type: none"> ▪ Revocable Trust <p>And,</p> <ul style="list-style-type: none"> ▪ Deed Recording, if applicable ▪ Other documents related to trust, if applicable. <ul style="list-style-type: none"> ▪ Stand-Alone Will ▪ Option to designate which property in Will and which in Revocable Trust. ▪ Custom language (starts +200) ▪ Does not include funding the trust

The above are packaged rates which are priced to be at a higher costs-savings than a la carte documents.

****OPTIONAL CLIENT CARE SUBSCRIPTION PLAN:** We will make basic changes and review documents annually. Contact us for more information.

****Our packages vary widely depending on estate planning documents best suited for your individual needs. Fee amounts will be discussed based on our review of your assets and goals during our consultation.**