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Standard Fee Schedule – Trusts & Estates January 2010

Basic Estate Plan Packages

Basic Estate Plan for One Person ----- \$600

Includes simple* will, durable power of attorney for finances, and advance health care directive.

Basic Estate Plan for a Couple ----- \$1,000

Includes simple* wills, durable powers of attorney for finances, and advance health care directives.

* Simple wills do not include testamentary trusts, such as trusts for children, for which extra charges apply.

Living Trust Packages

Revocable Living Trust Plan for One Person ----- \$1,600

Includes revocable living trust, certificate of trust, pour-over will, durable power of attorney for finances, advance health care directive, trust transfer deeds for up to 2 in-state properties, and letters of instruction requesting that assets be re-titled in the name of the trust. Extra charges may apply depending on assets.

Revocable Living Trust Plan for a Married Couple ----- \$2,250

Includes revocable living trust, certificate of trust, pour-over wills, durable powers of attorney for finances, advance health care directives, trust transfer deeds for up to 2 in-state properties, letters of instruction requesting that assets be re-titled in the name of the trust, and community property agreement (if desired). Extra charges may apply depending on assets.

A/B or A/B/C Trust Plan for a Married Couple ----- \$2,750

Includes revocable living trust designed to avoid or reduce estate tax, certificate of trust, pour-over wills, durable powers of attorney for finances, advance health care directives, trust transfer deeds for up to 2 in-state properties, letters of instruction requesting that assets be re-titled in trust's name, and community property agreement (if desired). Extra charges may apply depending on assets.

QDOT Trust Plan ----- \$3,000

Includes revocable living trust with QDOT provisions, certificate of trust, pour-over will, durable power of attorney for finances, advance health care directive, trust transfer deeds for up to 2 in-state properties, letters of instruction requesting that certain assets be re-titled in the name of the trust, and community property agreement (if desired). Extra charges may apply depending on assets.

Advanced Estate Plan Options

Buy-Sell Agreement ----- \$1,350 and up

Includes consultation with business owners and other professional advisors, document preparation, review of documents with client, and oversight of document execution.

Insurance Trust (ILIT) ----- \$1,800

Includes consultation, document preparation, funding letter, application for taxpayer identification number, review of documents with client, and oversight of document execution.

Special Needs Trust ----- \$1,800

Includes consultation, document preparation, application for taxpayer identification number, review of documents with client, and oversight of document execution.

Charitable Remainder Trust (CRT) ----- \$3,000

Includes consultation, document preparation, application for taxpayer identification number, review of document with client, and oversight of document execution.

Hourly Rate ----- \$250