

# Law Office of Nicole A. Davidson

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## Standard Fee Schedule – Trusts & Estates January 2011

### *Basic Estate Plan Packages*

**Basic Estate Plan for One Person** ----- \$750

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

**Basic Estate Plan for a Couple** ----- \$1,250

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** ----- \$1,750

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** ----- \$2,500

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** ----- \$3,000

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** ----- \$3,250

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** ----- \$1,500 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)** ----- \$2,000

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

**Special Needs Trust** ----- \$2,000

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