

## WILL AND TRUST ESTIMATED FEE GUIDELINE

**A. CONSULTATION ONLY:** Two consultations are included with all Wills and Trusts. If you want only a consultation, a one hour initial consultation for new clients regarding estate planning in general is available for \$75.00. A review of your current estate plan can be done, recommendations can be made and approximate costs can be estimated at the one hour consultation if you have complete asset information and well defined ideas on how you want to dispose of your property. Additional consultations after the initial consultation are available at our regular hourly rates, currently \$375.00 per hour.

**B. WILLS:**

1. All Will fees include:
  - a. Two Consultations
  - b. Will(s)
  - c. Durable Power(s) of Attorney for property management
  - d. Health Care Directives

Additional services such as audio or video taping or in home services are available at additional cost with fees estimated on an individual basis after analysis of the particular situation.

**2. SINGLE PERSONS**

- |  |             |
|--|-------------|
| a. Simple, never married   | \$500-\$550 |
| b. Simple, widowed   | \$550-\$575 |
| c. Simple, divorced  | \$550-\$575 |
| d. With testamentary trust for children<br>(not probate avoidance trust) | \$675-\$700 |

**3. HUSBAND AND WIFE (both Wills included)**

- |   |             |
|---|-------------|
| a. Simple, no prior marriages or children                         | \$650-\$750 |
| b. With children of prior marriages                               | \$750-\$950 |
| c. With trust for minor children<br>(not probate avoidance trust) | \$800-\$975 |

The fees may be increased (but not automatically) if more than two appointments are necessary or if you need to have the Wills signed in less than two weeks from your initial appointment.

**C. REVOCABLE TRUSTS**

**1. WHAT IS INCLUDED:** All basic revocable trust packages include:

- a. Two Consultation(s)
- b. Trust
- c. Durable Power(s) of Attorney for property management
- d. Health Care Directive(s)
- e. Complementary Wills (Pour-Over Wills)
- f. Transfer of Primary Residence to Trust

- g. Notary services for in office signing.
- h. Signing conference with attorney.

**2. WHAT IS NOT INCLUDED:** Trust fees include the preparation of a deed for the transfer of one primary residence to the trust. Transfer of additional property to the trust is not included and is generally the responsibility of the client. Arrangements may be made for the attorney to handle transfers at additional charge. As a general rule, attorney assistance is required for transfers of real property and secured interests in real property to the trust. Recording costs and fees are additional. Probate avoidance trusts do not include any tax planning. If your estate planning involves special circumstances such as business planning, children of prior marriages (blended families), or complex planning additional fees may apply.

**3. SINGLE PERSONS (PROBATE AVOIDANCE AND FAMILY PLANNING)**

- 1. Probate avoidance, planning for \$1,800.00  
minor children included if  
applicable

**4. MARRIED PERSONS (PROBATE AVOIDANCE AND FAMILY PLANNING)**

- a. Husband and Wife, probate avoidance  
and family planning, no tax planning  
\$2,100-\$2,300

**5. MARRIED PERSONS (TAX PLANNING)**

- b. Husband and Wife, tax planning,  
disclaimer trust \$2,300-\$2,500
- c. Husband and Wife, tax planning,  
A/B trust or A/B/C trust \$2,500-\$3,000

**D. IRREVOCABLE (PERMANENT) TRUSTS**

For larger estates a specialized irrevocable (permanent) trust may be done in addition to the revocable living trust in order to provide additional family, tax and estate planning benefits. Irrevocable trusts include irrevocable life insurance trusts to provide "tax free" liquid assets in larger estates, irrevocable tax exempt gift trusts (often referred to as "Crummey" trusts), and trusts which are focused on asset protection. Fees for irrevocable trusts are generally a minimum of \$3500.

**E. SPECIAL CIRCUMSTANCES AND ADDITIONAL CHARGES**

Business planning, complex estate planning, blended families and other special circumstances often involve additional charges. Funding of the trust may also involve additional fees. These additional fees are as follows in most situations:

Blended Families	\$600
Home Visits (depending on location)	\$300-\$500
Business planning, complex planning, specialized planning	\$375/hour
Transfer of California real estate	\$275
Coordinate transfer of out of state real estate with out of state attorney (out of state attorney fees are additional)	\$200
Transfer of stock in closely held corporation	\$300
Transfer of LLC or partnership interests	\$300

**F. HEALTH CARE DIRECTIVES AND DURABLE POWER OF ATTORNEY FOR PROPERTY MANAGEMENT** These documents are included with all Wills and trusts at no additional charge.

**G. UNIQUE AND SPECIAL CIRCUMSTANCES**

For most individuals or couples one of our basic estate planning packages can be customized to suit your needs. If you have unique or special circumstances involving a need for complex or specialized estate planning or asset protection strategies a specialized plan can be developed to suit your circumstances and individual needs. At your initial consultation we can ascertain your situation, evaluate your options, make recommendations to you, and provide you with a fee estimate for any specialized services.