

2010 – 2011 SHORT-FORM ESTATE PLANNING FEES

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CUSTOM WILL-BASED ESTATE PLANNING FEES

	<u>Flat-Fee</u>
♦ Will Plan for Individual with Outright Gifts to Beneficiaries.....	\$1,250
♦ Will Plan for Individual with Sub-Trusts for Beneficiaries.....	\$1,450
♦ Will Plan for Couple with Outright Gifts to Beneficiaries.....	\$1,650
♦ Will Plan for Couple with Sub-Trusts for Beneficiaries.....	\$1,850
♦ Will Plan for Couple with Complex Tax Planning.....	\$2,450

Your Custom Will-Based Estate Plan Includes:

1. Will
2. Durable Power of Attorney for Property
3. Power of Attorney for Health Care
4. Living Will
5. Necessary Consultations and Attorney Letters
6. In-person or Phone Meeting to Review First Drafts
7. One Revision of First Drafts
8. Signing Ceremony
9. Estate Plan Portfolio Binder
10. Estate Plan Flow-Chart
11. Second Set of Original Documents

♦ Update beneficiary designation forms.....	\$50 - \$600
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CUSTOM TRUST-BASED ESTATE PLANNING FEES

	<u>Flat-Fee</u>
♦ Revocable Living Trust Plan for Individual with Outright Gifts to Beneficiaries.....	\$2,550
♦ Revocable Living Trust Plan for Individual with Sub-Trusts for Beneficiaries.....	\$3,050
♦ Revocable Living Trust Plan for Couple with Outright Gifts to Beneficiaries.....	\$3,050
♦ Revocable Living Trust Plan for Couple with Sub-Trusts for Beneficiaries.....	\$3,550
♦ Revocable Living Trust Plan for Couple with Complex Transfer Tax Planning.....	\$4,050

Your Custom Trust-Based Estate Plan Includes:

1. Revocable Living Trust
 2. Will
 3. Durable Power of Attorney for Property
 4. Power of Attorney for Health Care
 5. Living Will
 6. Bill of Sale
 7. Memorandum for Distribution of Tangible Personal Property
 8. Sample Trust Funding Letters
 9. Deed in Trust (1) (*\$225 per additional deed*)
 10. Recording of Deed (*County Recorder's fee not included*)
 11. Necessary Consultations and Attorney Letters
 12. In-person or Phone Meeting to Review First Drafts
 13. One Revision of First Drafts
 14. Signing Ceremony
 15. Estate Plan Portfolio Binder
 16. Estate Plan Flow-Chart
 17. Second Set of Original Documents
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- | | |
|---|-----------------|
| ♦ Transfer assets to trust(s) and update beneficiary designation forms..... | \$200 - \$1,200 |
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COMPREHENSIVE ASSET PROTECTION PLAN*

	<u>Flat-Fee</u>
♦ Domestic Asset Protection Plan.....	\$15,550
♦ Off-Shore Asset Protection Plan.....	\$18,550

Your Comprehensive Asset Protection Plan Includes:

1. Asset Protection Trust (*foreign or domestic, as applicable*)
2. Limited Liability Company
3. Revocable Living Trust
4. Will
5. Durable Power of Attorney for Property
6. Power of Attorney for Health Care
7. Living Will
8. Bill of Sale
9. Memorandum for Distribution of Tangible Personal Property
10. Sample Trust Funding Letters
11. Deed in Trust (1) (*\$225 per additional deed*)
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- ♦ Transfer assets to trust(s) and update beneficiary designation forms..... \$200 - \$1,200

Comprehensive asset protection plans are primarily for **medical doctors; osteopathic doctors; podiatrists; chiropractors; dentists; business owners; builders and contractors; residential and commercial real estate investors, including landlords; lake-home owners; boat, plane, and ATV owners; attorneys; certified public accountants; and other professionals who are at high risk for being sued.*

Comprehensive asset protection plans are also appropriate for clients who simply want to structure their estate plan to include effective asset protection tools. You should know that a standard revocable living trust provides **NO asset protection, unlike the above comprehensive asset protection plans.*