

ESTATE PLANNING FEE SCHEDULE

(These fees are effective as of January 2011 and are subject to change at any time without notice)

The following is a list of the most common estate planning documents we prepare. There are a number of documents included in the "Will Packages" and in the "Trust Packages." Rather than list the price for each item in a package individually, which may be misleading, we list them in groups because all the documents are needed to create an estate plan. We can also assist you with Probate (if necessary), Trust Administration, Conservatorships, Guardianships, and some Medi-Cal Planning.

Payment of fees is required before we begin drafting your documents. If you have a question about our fees, please feel free to discuss them with us at the time of your initial consultation.

*In addition to the charges shown below, documents needed to transfer assets to a Trust, such as Deeds, Affidavits, and Assignments, will be charged at \$100 each and are not included in the package price. The County Recorder's charges to record any such documents will be advanced by us and billed to you.

1. **Estate Planning Consultation at Our Office for New Clients with NO Existing Estate Plan** **NO CHARGE**
2. **Estate Planning Consultation at Our Office for New Clients with an Existing Estate Plan**
(This includes attorney review of existing estate planning documents and a consultation with an attorney to discuss current estate plan recommendations and changes you are considering. We must receive a COPY of your existing estate planning documents (not the originals, but a copy we can keep) together with payment of this fee at least two weeks before your appointment date to allow sufficient time for an attorney to review your documents and prepare thoroughly for your appointment.).....**Minimum \$250**
3. **Will Package for an Individual**.....**\$350**
 - Will
 - Power of Attorney for Health Care/Advance Health Care Directive
 - Power of Attorney for Asset Management
4. **Will Package for a Married Couple**.....**\$500**
 - Wills
 - Power of Attorneys for Health Care/Advance Health Care Directives
 - Power of Attorneys for Asset Management
5. **"Standard" Trust Package**
(Usually appropriate for a single person or for a married couple with assets totaling approximately \$1 million or less)
 - Standard Trust
 - Will(s)
 - Certification of Trust
 - Community Property Declaration (if needed)
 - Bill of Sale for Personal Property
 - Power of Attorney(s) for Health Care/Advance Health Care Directive(s)
 - Power of Attorney(s) for Asset Management

ESTIMATED TOTAL.....**\$1,500***

6. "A & B" Trust Package

(Usually appropriate for a married couple with assets in excess of \$1 million or with complex family situations)

- "A/B" Trust
- Wills
- Certification of Trust
- Community Property Declaration (if needed)
- Bill of Sale for Personal Property
- Power of Attorneys for Health Care/Advance Health Care Directives
- Power of Attorneys for Asset Management

ESTIMATED TOTAL\$1,800*

7. "Q-TIP" Trust Package (A/B/C Trust)

(Usually appropriate for a married couple with assets over \$10 million)

- "Q-TIP" Trust
- Wills
- Certification of Trust
- Community Property Declaration (if needed)
- Bill of Sale for Personal Property
- Power of Attorneys for Health Care/Advance Health Care Directives
- Power of Attorneys for Asset Management

ESTIMATED TOTAL\$3,000*

8. S-Corporation Provisions.....Additional \$500

9. Special Needs Trust Provisions.....Additional \$500

10. Special Needs Trust.....\$1,800

11. Irrevocable Life Insurance Trust.....\$1,800

12. Amendments.....Minimum \$350

13. Complete Restatement of Existing Trust\$1,000-\$2,000

Conversion to our: (a) Standard Trust \$1,000; (b) A & B Trust \$1,250; (c) A/B/C Trust \$2,000

14. Codicil to WillMinimum \$150

15. Power of Attorney for Asset Management \$100

16. Power of Attorney for Health Care/Advance Health Care Directive..... \$100

17. Additional Services\$300/hour

We Look Forward to Serving You!