

ESTATE PLANNING FEE SCHEDULE

(These fees are effective as of January 1, 2015 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.

*The preparation of deeds and affidavits needed to transfer **one California property** into a Trust are included in the package price shown below. The preparation of deeds or affidavits needed to transfer additional California properties into a Trust will be charged at **\$350-\$500 each** and are **not** included in the package price. *The County Recorder's charges to record any 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: John T. Anderson \$450/hr. | Lisa R. Norman & Erin M. Anderson \$300/hr.

John T. Anderson, Jr. \$200/hr. | Paralegals and Legal Assistants \$150/hr.

[Minimum time billed is 0.1 hrs.]

We Look Forward to Serving You!

AFTER-DEATH ADMINISTRATION FEE SCHEDULE

(These fees are effective as of January 1, 2015 and are subject to change at any time without notice)

The following is a list of common charges associated with post-death administration. Most fees related to the administration of a trust are charged at the individual attorney's or staff member's usual hourly rate (as provided below) or are based off of one percent of the gross value of the decedent's estate. For probates, attorneys' fees are based upon the rates outlined in the California Probate Code (see below).

These fees are merely an estimate and are subject to change at any time and without notice. We strive to be transparent and upfront about our fees. For a more detailed explanation of our fees, please see your specific client retainer agreement. If you have questions about our fees, please contact our office.

Initial Trust Administration Appointment **\$250.00**

Appointment with attorney for the Successor Trustee after a person with a trust has passed away.

[Includes attorney review of decedent's estate plan and a one hour consultation with an attorney]

Trust Administration Retainer Amount **\$1,500.00**

If, after the initial consultation, you decides to retain our office, the above-mentioned, nonrefundable retainer amount is due, together with our signed retainer agreement, before we begin preparing any documents or performing any further tasks. Fees for our trust administration services are based on our hourly fee rates (see below) or upon one percent of the **GROSS** value of the decedent's estate depending on the specific situation and agreement between you and our office.

Estimated Total Trust Administration Fees

\$2,000.00 to \$6,000.00 or one percent of the gross value of the decedent's estate.

California Deeds: **Minimum \$350.00***

*Plus County Recorder's fees, which will be advanced by us and billed to you.

*Includes all necessary County Assessor's forms.

Affidavit Death of (Trustee/Joint Tenant) **Minimum \$500.00***

*Plus County Recorder's fees, which will be advanced by us and billed to you.

*Includes all necessary County Assessor's forms.

Small Estate Affidavit / California 13100 Petition **\$200.00**

Certification of Trust **\$150.00**

Probate Fees

Our fees for probate matters are based on California Probate Code section 10810 as outlined below. Probate fees are based on the **GROSS** value of the decedent's estate and do not include costs such as court costs and court fees. Probate Attorneys' Fees:

4% of the first \$100,000;
3% of the next \$100,000;
2% of the next \$800,000;
1% of the next \$9,000,000; and,
0.5% of the next \$15,000,000.

Hourly Rates

John T. Anderson \$450/hr. | Lisa R. Norman & Erin M. Anderson \$300/hr.

John T. Anderson, Jr. \$200/hr. | Paralegals and Legal Assistants \$150/hr.

[Minimum time billed is 0.1 hrs.]