



Features	LITE \$2,000	STANDARD Most Popular \$3,000	PREMIUM \$5,000
<b>Attorney Meetings</b>	2	3	4+
<b>Living Trust</b> (Outright Distributions and Same Distributions For Both Spouses) See "Upgrades" at the back For Additional Options	✓	✓	✓
<b>Certification of Trust</b>	✓	✓	✓
<b>Declaration of Trust</b>	✓	✓	✓
<b>Assignment of Personal Property</b>	✓	✓	✓
<b>Pourover Will(s)</b>	✓	✓	✓
<b>Durable Financial Power(s) of Attorney</b>	✓	✓	✓
<b>Health Care Power(s) of Attorney</b>	✓	✓	✓
<b>Advance Health Care Directive(s)</b> (Living Will)	✓	✓	✓
<b>HIPAA Medical Records Release(s)</b>	✓	✓	✓
<b>Estate Plan Owner's Manual</b>	✓	✓	✓
<b>Document Locator</b>	✓	✓	✓
<b>Declaration Regarding Final Arrangements</b>	✓	✓	✓
<b>Trust Funding Toolkit</b>	✓	✓	✓
<b>Free Check-Up Every 3 Years</b>	✓	✓	✓
<b>Digital Copies of Signed Estate Plan Documents on Disc &amp; Stored in Our System</b>	✗	✓	✓
<b>Free Post-Mortem Consultation with Trustee</b>	✗	✓	✓
<b>Fiduciary Letters Explaining Role and Responsibilities</b>	✗	✓	✓
<b>Family Legacy Interview - 30 Minute Audio Recording</b>	✗	✓	✓
<b>Comprehensive Successor Trustee Manual</b>	✗	✗	✓
<b>Trust Funding Process</b>	Funding Letter Forms Provided	<b>Trust Funding Guarantee:</b> Customized Funding and Transfer Letters with Unlimited Assistance and Follow-Up	Full Service Funding Provided By Our Office, Requires Minimal Client Involvement
<b>Real Estate Transfer Deeds</b>	1	Up to 3	Up to 5
<b>Discount on Additional Trusts</b>	\$500	\$1,000	\$1,000

## ADDITIONAL UPGRADES

### Living Trust Upgrades

Bloodline Protection Trust	<b>\$1,000</b>
Perpetual Asset Protection Trust	<b>\$1,000</b>

### Advanced Guardianship Planning

Kids Protection Plan <sup>SM</sup> - Stand-alone	<b>\$1,000</b>
Kids Protection Plan <sup>SM</sup> - Add-on	<b>\$750</b>

### Advanced Trusts\*

First Party Special Needs Trust <small>(May Require Additional Fees if Court Appearance is Necessary)</small>	<b>\$3,000</b>
Third Party Special Needs Trust	<b>\$2,500</b>
Retirement Inheritance Trust (IRA Trust)	<b>\$2,500</b>
Irrevocable Life Insurance Trust (ILIT)	<b>\$2,500</b>
Irrevocable Medicaid Planning Trust	<b>\$2,500</b>
Domestic Asset Protection Trust (DAPT) <small>(Legal fees only)</small>	<b>\$7,500</b>
Qualified Personal Residence Trust (QPRT)	<b>\$7,500</b>
All Others	<b>Case By Case</b>

*\*A discount applies to all advanced trusts when bundled with an estate planning package. See table above for details.*

### Estate Planning Amendments

Complete Amendment and Restatement	
Lite	<b>\$1,750</b>
Standard	<b>\$2,500</b>
Premium	<b>\$4,000</b>
Substitution of Fiduciary	<b>\$250 / Document</b>
Fiduciary Substitution Package <small>(includes 1 trust, wills, DPOAs, &amp; HCPOAs)</small>	<b>\$1,000</b>
Distribution Change	<b>\$500</b>
Asset Protection Advising	<b>\$300 / hr</b>

### Probate Estate & Trust Administration

Personal Representative Step-In	<b>3-5% of Probate Assets</b>
Successor Trustee Step-In	<b>1.5% of Trust Assets</b>
Personal Representative/Successor Trustee Advising	<b>\$300/hr</b>

### Miscellaneous

Full Service Funding for Existing Trust	<b>\$2,000</b>
Will Package (No trust)	<b>\$1,000</b>
Successor Trustee Manual	<b>\$200 each</b>
Additional Deeds	<b>\$250 each</b>

### Business Formation Packages

Lite	<b>\$1,000</b>
Standard	<b>\$2,000</b>
Premium	<b>\$3,000+</b>
Corporation to LLC Conversion	<b>\$2,000</b>
Basic Trademark	<b>\$975 (incl. filing fee)</b>
Advanced Trademark	<b>\$975 +\$300 / hr</b>

### Outsourced General Counsel Services

Bronze Level	<b>\$500 / mo.</b>
Silver Level	<b>\$1,000 / mo.</b>
Gold Level	<b>\$1,500 / mo.</b>
Platinum Level	<b>\$2,500 / mo.</b>

### Collaborative Family Law Services

Mutual Prenuptial Agreement	<b>\$2,500</b>
Uncontested Separation Agreement & Property Settlement	<b>\$2,500</b>
Collaborative Negotiation of Separation Agreement & Property Settlement	<b>\$300 / hr</b>