**Fees for Estate Planning Packages**







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**Package for a couple**: Includes an initial one-hour consultation\* and review of estate planning needs, a joint living revocable trust agreement with schedules of assets, two pour-over wills with burial instructions, pet provision and/or guardianship provision (if minor children are involved also includes minor medical authorization), preparation of a trust transfer deed\*\* and county paperwork to transfer the primary residence into the trust, two advance healthcare directives, two HIPAA authorization forms, two durable powers of attorney for financial purposes, instructions for executing the documents and a tabbed binder for storing the documents: Total $2800.00, reflects a $1400.00 savings.

**Package for an individual**: Includes an initial one-hour consultation\* and review of estate planning needs, an individual living revocable trust agreement with schedule of assets, a pour-over will with burial instructions, pet provision and guardianship provision (if minor children are involved also includes minor medical authorization), preparation of a trust transfer deed\*\* and county paperwork to transfer the residence into the trust, one advance healthcare directive, one HIPAA authorization form, one durable power of attorney for financial purposes, instructions for executing the documents and a tabbed binder for storing the documents: Total $2500.00, reflects a $800.00 savings.

\*Initial consultations for estate plans include the following: a one-hour consultation either in person or via telephone explaining the differences between wills and trusts, description of various trusts, explanation of advance healthcare directives and durable powers of attorney, explanation of different options for holding title to real property, opportunity to answer any questions about estate planning and/or the probate process and a review of client’s estate planning goals. Follow-up questions regarding your plan via telephone and/or email are included in all package pricing. However, follow-up consultations with clients and/or other professionals, including trips to the client’s home or office for signing of documents or explanation of drafts and preparation of additional documents shall be charged at the current hourly rate.

\*\*Trust transfer deeds for additional properties are charged at $300.00 per property for California properties; prices vary for out-of-state properties.

The quoted fees do not include notary fees or county recorder fees. Notary fees are charged by the notary and average $10/per signature. County recorder fees vary, but average $30.00 per property. Copying and postage fees for the client are included for all estate planning packages & flat fee documents. If additional copies are requested, a copying fee may be charged. Documents requested on an expedited basis may be charged up to an additional 25% on top of package price.

# Fees for Separate Legal Documents

**Revocable Living Trust**: $2000.00 and up. This document is instrumental in helping clients avoid the costly probate process. The living trust should be used by all individuals who own real property in the state of California as it is an affordable & convenient alternative to probate. This price includes an initial one hour consultation and review of estate planning needs, the living trust agreement with schedule of assets, instructions for transferring the residence and other assets into the trust; a grant deed & county paperwork for transferring the primary residence into the trust and an IRS EIN application for tax purposes if needed. Additional properties are transferred at an additional cost, please see below.

**Special Needs Trust:** $2500.00 and up. A Special Needs Trust is a specialized legal document designed to benefit an individual who has a disability. A Supplemental Needs Trust is most often a “stand alone” document, but it can form part of a Last Will and Testament. A Supplemental Needs Trust enables a person under a physical or mental disability, or an individual with a chronic or acquired illness, to have, held in Trust for his or her benefit, an unlimited amount of assets. In a properly-drafted Supplemental Needs Trust, those assets are not considered countable assets for purposes of qualification for certain governmental benefits. For purposes of a Supplemental Needs Trust, an individual is considered impoverished if his or her personal assets are less than $2,500.00. A Supplemental Needs Trust provides for supplemental and extra care over and above that which the government provides.

**Complex Trusts including Irrevocable Life Insurance Trusts, Charitable Remainder Trusts, Separate**

**Property/Income Trusts:** start at $3000.00 and are based on an estimate of hours; the number of assets, complexity of the estate and funding issues may increase the billing on an hourly basis of $300/hour.

**C-Corps; S- Corps; Limited Liability Corporation:** Formation and filing for first corporation starts at $2500.00, second corporation $1500.00, third + corporation $1000.00; depending on the number of members/shareholders. A Limited Liability Corporation, LLC, is an excellent addition to a traditional estate plan for those clients who own multiple properties, and/or own assets with other persons, and are looking for potential tax savings as well as additional liability protection. This fee includes the State of California filing fees but does not include the $800 annual franchise tax. Sub and mirror corporations are offered at a volume discount.

**Last Will & Testament:**  $1200.00 for a couple (two wills $200 discount), $700.00 for a single person (one will). This document is a basic requirement for most persons as it includes instructions for burial, guardianship provisions (if minor children are involved) and provisions for pets (as needed) and distribution of personal property. This document is especially important for persons with minor children as it includes a guardianship provision. This price includes an initial one hour consultation and review of estate planning needs, a will with burial provision and guardianship provision if minor children are involved, instructions for executing and storing the will and two copies. This document is included in the estate planning packages at no additional cost.

**Separate Guardianship Provisions or Codicils to add to an existing Will(s):** $300 per hour (1-2 hours estimated time); Includes a comprehensive consultation to determine the type of guardianship provision required, follow up questions via email or telephone and drafting of the stand-alone agreement

**Additional Trust Transfer Deeds:** $300.00 per California deed. This is required in order to transfer real property into a trust after the trust has been created, referred to as “funding a trust.” Preparation includes Preliminary Change of Ownership Report and Tax Exemption Affidavit. This fee does not include notary or county recording fees. Fees may be higher for out-of-state deeds.

**Advance Healthcare Directives-AHCD:** $300.00 per person, $500.00 per couple (two AHCDs $100 discount). This document is critical in managing your healthcare in the event that you become mentally or physically incapacitated. Most hospitals require an advance healthcare directive in order to be admitted for surgery. This document includes a HIPAA authorization form. This document is included in the estate planning packages at no additional cost.

**Durable Powers of Attorney for financial purposes - DPOA:** $300 per person, $500.00 per couple (two DPOAs $100 discount). This document is especially important for elderly, ill and single persons who do not hold their banking and investment accounts jointly (i.e. with another individual). This document can be designed to “spring to life” upon a doctor declaring you mentally or physically disabled or can be drafted to become effective immediately. The latter type of document is especially helpful to those clients who travel out of the country on a regular basis or for a specific purpose, such as a real estate purchase. This document is included in the estate planning packages at no additional cost.

**Pre-Nuptial & Ante-nuptial Agreements:** start at $2500.00; Includes a comprehensive consultation to determine the type of agreement needed; consultation with the other party’s attorney as needed; any follow questions via email or telephone and drafting and editing of the agreement.

**Hourly Fees:** Consulting on general legal matters, trust administration for estates & advisement, document review & drafting; and other estate or business planning advisement or document review: $300.00 per hour

# Payment Information

These fees will remain in effect until the end of 2023. We accept Visa and MasterCard and full payment is due at the consultation. If paying by check you may make two payments, the first is due at the initial consultation with the balance due within 30 days. Please mail all payments to: PO Box 2228 Shelbyville, TN 37162. California State Bar #208760

Tennessee State Bar/BPR Registration #040099

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