

Flat Fee Estate Planning Guideline

[Actual Fee Based on Scope of Work After Initial Consultation]

Revocable Trust Plan for Individual _____	\$2,000
Revocable Trust Plan for Couple _____	\$2,500
Additional Trust Transfer Deeds (1st Deed included in flat fee) _____ (Does not include County Recording Fees)	\$150 each
Optional Asset Transfer (other than real property) _____	\$300/hour

Revocable Trust Plan Includes:

- Revocable Living Trust, including Asset Schedule
- Tangible Personal Property Gift Schedule
- Trust Synopsis and Estate Plan Flow Chart
- Will
- Durable Power of Attorney for Property
- Advance Health Care Directive including Nomination of Agent for Health Care
- Certification of Trust
- General Transfer
- One Trust Transfer Deed (\$150 per additional deed)
- Recording of Deed in County Recorder's Office (does not include recording fee)
- In Office Initial Consultations and Attorney Letters
- In Office or Phone Conference Review of First Drafts
- One Revision of First Draft
- Client Initiated Phone Consults for One Year
- In Office Signing with Notary
- Estate Plan Portfolio Binder including Originals and One Photo Copy



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