

FEE SCHEDULE



**EAGLE
& FEIN**

ATTORNEYS & COUNSELORS AT LAW

A PROFESSIONAL CORPORATION

Level I - Planning

Will Centered Estate Planning without Protection Planning **\$1,500 - \$3,500**

Includes:

- A Will
- General Power of Attorney
- Health Care Power of Attorney
- Living Will

If married, each spouse's plan includes the above.

Will Centered Estate Planning with Protection Planning **\$2,000 - \$5,000**

Includes:

- A Will
- General Power of Attorney
- Health Care Power of Attorney
- Living Will
- Letter of Instruction to assist in Changing Beneficiaries

If married, each spouse's plan includes the above.

Medicaid Planning **\$4,500 - \$12,500**

Includes:

- Pre-planning for Medicaid
- Emergency planning, if necessary
- Eligibility Determination
- Spend Down Requirements
- Gifting ability
- Using Irrevocable or Revocable Living Trusts, when applicable

If married, each spouse's plan includes the above.

Living Trust Centered Estate Plan **\$3,500 - \$7,500**

Includes:

- A Revocable Living Trust
- A Will
- General Power of Attorney
- Health Care Power of Attorney
- Living Will
- Affidavit of Trust
- Comprehensive Funding – we are responsible to assure that your trusts are “fully funded”
- Design of your unique planning provisions
- Explanation of each planning tool
- Review of each document
- Six-month meeting

If married, each spouse's plan includes the above.

Level I - Planning (continued)

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| Annual Meetings | \$500 - \$2,000 |
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Includes:

- Annual Amendment to your Living Trust, if necessary, due to changes in goals and objectives
- Technical Amendments, if necessary
- Attorney's "Improvements" in Language to your Living Trust, if necessary
- Review of funding of your Living Trust
- Quarterly newsletter
- Review of your existing plan
- Review of additional estate planning tools which may be useful due to a change in circumstances

If married, each spouse's plan includes the above.

Level II - Advanced Planning - Implementation

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| Irrevocable Life Insurance Trust (without Level I) | \$2,500 - \$5,000 |
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| Irrevocable Life Insurance Trust (with Level I Planning) | \$3,500 |
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| Family Limited Partnership or Limited Liability Company | \$10,000 |
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| Sale to Intentionally Defective Irrevocable Grantor Trust (IDIT) | \$25,000 |
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Includes IDIT and Family Limited Partnership

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| Charitable Remainder Trust | \$5,000 |
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| Charitable Lead Trust | \$5,000 |
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| Grantor Retained Trusts and Personal Residence Trusts | \$5,000 |
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| Cash Flow Analysis with Gifting Recommendations | \$3,500 |
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| Off-Shore Asset Protection Trust | \$25,000 - \$50,000 |
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| Other Advanced Planning Tools | To be Quoted in Advance |
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Wealth Strategies Design Planning Process

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| To be quoted in advance based on our Billing Philosophy. | Minimum fee of \$7,500 |
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Only appropriate for a client with a net worth of \$5,000,000 or more.

All planning includes design of your unique planning provisions, explanation of each planning tool, review of each document, and six-month meeting. Fees do not include filing fees or outside counsel fees.

Living Trust Administration

Hourly at the rates set forth below

Probate Administration

Hourly Rates Determined as follows:

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|--------------|------------------------------------|
| \$350 | Principal Attorney |
| \$250 | Senior Associate Attorney |
| \$200 | Associate Attorney Level II |
| \$165 | Associate Attorney Level I |
| \$165 | Senior Staff Accountant |
| \$125 | Staff Accountant |
| \$125 | Paralegal |
| \$100 | Legal Assistant |

Billed monthly pursuant to a fee agreement.

Business Continuation Planning, Business Transactions, Corporate Counsel, ESOPs, ERISA, Probate and Trust Litigation, Tax Controversies, and Living Trust Administration

Hourly Rates Determined as follows:

| | |
|--------------|------------------------------------|
| \$350 | Principal Attorney |
| \$250 | Senior Associate Attorney |
| \$200 | Associate Attorney Level II |
| \$165 | Associate Attorney Level I |
| \$165 | Senior Staff Accountant |
| \$125 | Staff Accountant |
| \$125 | Paralegal |
| \$100 | Legal Assistant |

Billed monthly pursuant to a fee agreement.

