

# FEE SCHEDULE

As of February 1, 2016

## 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)

**Annual Meetings** **\$500 - \$2,000**

**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

**Irrevocable Life Insurance Trust (without Level I)** **\$4,500 - \$7,500**

**Irrevocable Life Insurance Trust (with Level I Planning)** **\$4,500**

**Family Limited Partnership or Limited Liability Company** **\$10,000**

**Sale to Intentionally Defective Irrevocable Grantor Trust (IDIT)** **\$25,000**

*Includes IDIT and Family Limited Partnership*

**Charitable Remainder Trust** **\$7,500**

**Charitable Lead Trust** **\$7,500**

**Grantor Retained Trusts and Personal Residence Trusts** **\$7,500**

**Cash Flow Analysis with Gifting Recommendations** **\$3,500**

**Off-Shore Asset Protection Trust** **\$25,000 - \$50,000**

**Other Advanced Planning Tools** **To be Quoted in Advance**

## Wealth Strategies Design Planning Process

**To be quoted in advance based on our Billing Philosophy.** **Minimum fee of \$10,000**

*Only appropriate for a client with a net worth of \$10,000,000 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.*

## All Other Services

### Hourly Rates Determined as follows:

\$350	Managing Attorney/Brian A. Eagle
\$250	Senior Associate Attorney/Lucy A. Khairy
\$200	Associate Attorney
\$165	Junior Associate Attorney
\$165	Senior Staff Accountant
\$165	Senior Client Services Associate
\$125	Staff Accountant
\$125	Client Services Associate
\$100	Client Services Assistant

*Billed monthly pursuant to a fee agreement.*

