

# FEE SCHEDULE

As of January 1, 2018

## Level I - Planning

<b>Will Centered Estate Planning without Protection Planning</b>	<b>\$1,500 - \$3,500</b>
<b>Includes:</b> <ul style="list-style-type: none"><li>• A Will</li><li>• General Power of Attorney</li><li>• Health Care Power of Attorney</li><li>• Living Will</li></ul>	
<i>If married, each spouse's plan includes the above.</i>	

<b>Will Centered Estate Planning with Protection Planning</b>	<b>\$2,000 - \$5,000</b>
<b>Includes:</b> <ul style="list-style-type: none"><li>• A Will</li><li>• General Power of Attorney</li><li>• Health Care Power of Attorney</li><li>• Living Will</li><li>• Letter of Instruction to assist in Changing Beneficiaries</li></ul>	
<i>If married, each spouse's plan includes the above.</i>	

<b>Medicaid Planning</b>	<b>\$4,500 - \$12,500</b>
<b>Includes:</b> <ul style="list-style-type: none"><li>• Pre-planning for Medicaid</li><li>• Emergency planning, if necessary</li><li>• Eligibility Determination</li><li>• Spend Down Requirements</li><li>• Gifting ability</li><li>• Using Irrevocable or Revocable Living Trusts, when applicable</li></ul>	
<i>If married, each spouse's plan includes the above.</i>	

<b>Living Trust Centered Estate Plan</b>	<b>\$3,500 - \$7,500</b>
<b>Includes:</b> <ul style="list-style-type: none"><li>• A Revocable Living Trust</li><li>• A Will</li><li>• General Power of Attorney</li><li>• Health Care Power of Attorney</li><li>• Living Will</li><li>• Affidavit of Trust</li><li>• Comprehensive Funding – we are responsible to assure that your trusts are “fully funded”</li><li>• Design of your unique planning provisions</li><li>• Explanation of each planning tool</li><li>• Review of each document</li><li>• Six-month meeting</li></ul>	
<i>If married, each spouse's plan includes the above.</i>	

## 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
\$200	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.*

