

FEE SCHEDULE

As of January 1, 2025



Level I - Planning

Will Centered Estate Planning without Protection Planning	\$2,000 - \$4,500
Includes: <ul style="list-style-type: none">• A Will• General Power of Attorney• Health Care Power of Attorney• Living Will	
<i>If married, each spouse's plan includes the above.</i>	

Will Centered Estate Planning with Protection Planning	\$2,500 - \$6,000
Includes: <ul style="list-style-type: none">• A Will• General Power of Attorney• Health Care Power of Attorney• Living Will• Letter of Instruction to assist in Changing Beneficiaries	
<i>If married, each spouse's plan includes the above.</i>	

Medicaid Planning	\$5,000 - \$13,500
Includes: <ul style="list-style-type: none">• Pre-planning for Medicaid• Emergency planning, if necessary• Eligibility Determination• Spend Down Requirements• Gifting ability• Using Irrevocable or Revocable Living Trusts, when applicable	
<i>If married, each spouse's plan includes the above.</i>	

Living Trust Centered Estate Plan	\$4,000 - \$10,000
Includes: <ul style="list-style-type: none">• 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	
<i>If married, each spouse's plan includes the above.</i>	

Level I - Planning (continued)

Annual Meetings **\$800 - \$6,000**

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 Trust (without Level I) **\$9,000 - \$13,000**

Irrevocable Trust (with Level I Planning) **\$8,000**

Family Limited Partnership or Limited Liability Company **\$10,500**

Sale to Intentionally Defective Irrevocable Grantor Trust (IDIT) **\$25,500**

Includes IDIT and Family Limited Partnership

Charitable Remainder Trust **\$8,500**

Charitable Lead Trust **\$8,500**

Grantor Retained Trusts and Personal Residence Trusts **\$8,500**

Cash Flow Analysis with Gifting Recommendations **\$4,000**

Off-Shore Asset Protection Trust **\$25,500 - \$50,500**

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

Wealth Strategies Design Planning Process

To be quoted in advance based on our Billing Philosophy.
Only appropriate for a client with a net worth of \$10,000,000 or more.

Minimum fee of \$10,500

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:

\$575	Brian A. Eagle
\$405	Shareholder Attorney
\$405	Accountant– Director
\$310	Accountant– Manager
\$295	Associate Attorney
\$215	Accountant– Senior Staff
\$215	Law Clerk/Summer Associate
\$180	Accountant– Staff
\$180	Client Services Associate
\$160	Client Services Assistant

Billed monthly pursuant to a fee agreement.

