

FEE SCHEDULE

As of January 1, 2026



Level I - Planning

Will Centered Estate Planning without Protection Planning	\$2,000 - \$6,500
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 - \$8,000
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 - \$15,500
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	\$4,000 - \$12,000
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 **\$1,000 - \$10,000**

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) **\$10,000 - \$15,000**

Irrevocable Trust (with Level I Planning) **\$10,000**

Family Limited Partnership or Limited Liability Company **\$12,500**

Sale to Intentionally Defective Irrevocable Grantor Trust (IDIT) **\$27,500**

Includes IDIT and Family Limited Partnership

Charitable Remainder Trust **\$10,500**

Charitable Lead Trust **\$10,500**

Grantor Retained Trusts and Personal Residence Trusts **\$10,500**

Cash Flow Analysis with Gifting Recommendations **\$10,000**

Off-Shore Asset Protection Trust **\$25,500 - \$52,500**

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

Wealth Strategies Design Planning Process

Hourly or to be quoted in advance based on our Billing Philosophy. **Minimum fee of \$15,000**
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:

\$600	Brian A. Eagle
\$425	Senior Shareholder Attorney
\$325	Shareholder Attorney
\$425	Accountant– Director
\$325	Accountant– Manager
\$295	Associate Attorney
\$225	Accountant– Senior Staff
\$225	Law Clerk/Summer Associate
\$190	Accountant– Staff
\$190	Client Services Associate
\$170	Client Services Assistant

