

# Custom Build the Right Estate Plan For You & Your Loved Ones

	BASIC	STANDARD	PREMIUM	
<b>Living Trust</b> (Basic has outright distributions only and same distribution for both spouses; Standard and Premium <sup>1</sup> include protective trusts for heirs, multiple asset transfers; see below)	✓	✓	✓	
<b>Pour-over Will(s)</b>	✓	✓	✓	
<b>Property Agreement</b> (if married)	✓	✓	✓	
<b>Deeds, Transfer Letters and Assignments<sup>2</sup></b>	✓	✓	✓	
<b>Durable Power of Attorney</b>	✓	✓	✓	
<b>Advance Health Care Directive</b>	✓	✓	✓	
<b>HIPAA Authorization</b>	✓	✓	✓	
<b>Family Planning Directives</b>	✓	✓	✓	
<b>FREE Checkup Meeting Every 3 Years</b>	✓	✓	✓	
<b>FREE Consultation with Trustee at Disability and Death</b>	✓	✓	✓	
<b>FREE Consultation with Affiliated Financial Advisors</b>	<b>FIXED FEE</b>	✓	✓	
<b>Protective Trusts for Heirs -</b> Staged Distribution, Lifetime, Spendthrift or Special Needs Trusts		✓	✓	
<b>INSURANCE Irrevocable Trust</b> (if applicable)		<b>FIXED FEE</b>	✓	
<b>CHARITABLE Remainder Trust</b> (if applicable)			✓	
<b>CAPITAL GAINS Protective Trust</b> (if applicable)			✓	
<b>Personal Asset Trust</b> (if applicable)			✓	
<b>Advanced-Level Estate, Tax &amp; Asset Protection Meeting</b>			✓	
<b>Single Person</b>		\$2,695	\$3,595	\$5,450
<b>Married Couple</b>		\$3,495	\$4,495	\$6,450
<b>LLCs or other Asset Protection Planning Vehicles</b>		\$1,500 each, <sup>3</sup> includes 1 year of LLC management compliance service		
<b>Amendment New or Existing Client</b>	Fixed Fee - quoted after review			

<sup>1</sup> Premium is not set on a fixed fee; it anticipates more than Standard Asset Transfers, including multiple generational planning, and succession planning for businesses.

<sup>2</sup> Often substantial additional time incurred, especially where assets are located in states other than California. Our office does everything we can to coordinate with lenders within the 3 transfers limit. All transfers over the 3 transfers limit are billed at \$175 per transfer.

- Additional non-fixed fee: Estate Administration – hourly, but generally performed by paralegals at \$175.00/hr.

<sup>3</sup> Fixed fee does not include Franchise Tax Board or Secretary of State fees.