
FEES FOR ESTATE PLANNING SERVICES

OUR FEES FOR ESTATE PLANNING are divided into three categories: (1) the *Pre-Planning Initial Consultation* phase (during which we ascertain your situation, explain your options and make recommendations); (2) the *Estate Planning* phase (where we create a customized integrated estate plan for you based on the decisions made during the initial consultation); and (3) the *Post-Planning Funding the Trust* phase (where you and/or we — as you decide — transfer your assets into the trust).

PRE-PLANNING INITIAL CONSULTATION:

\$250.00 per hour

The pre-planning initial consultation fee will be waived when you retain us to prepare your estate plan. If you do not retain us to prepare your estate plan, the pre-planning consultation fee is due and payable at the conclusion of the consultation.

ESTATE PLANNING

Basic Revocable Living Trust Packages do not involve business planning, complex estate planning or other special circumstances. The Basic Revocable Living Trust Package includes an initial conference with an attorney; a revocable living trust which eliminates the need for probate or conservatorship as to all assets transferred into the trust; pour-over will(s) which act as a safeguard to insure that all property is distributed according to your plan even if an asset was not transferred into your trust during your lifetime; durable limited power of attorney for assets which allows a spouse or other chosen agent to handle your financial affairs if you are unable to do so; advance health care directive(s) which name an agent to make health care decisions for you if you are unable to do so; a community property agreement for married couples; a trust transfer quitclaim deed to put your California personal residence into the trust; the signing conference with an attorney; notary services; recording fees for the trust transfer quitclaim deed; binder for original documents and one set of copies; a trust management letter; and form letters which you can complete and deliver to financial institutions to transfer bank and investment accounts to your trust:

<i>Single Person</i>	\$1,800.00
<i>Married Couple — Disclaimer Trust</i>	\$2,150.00
<i>Married Couple — AB or ABC Trust</i>	\$2,400.00

Business Planning, Complex Planning, Special Circumstances, Other Extra Charges

If your estate planning involves business planning, complex estate planning or other special circumstances, our fees in addition to the appropriate Basic Revocable Living Trust Package fees, above, are as follows:

<i>Blended Families</i>	\$600.00
<i>Dynasty Trusts</i>	\$600.00
<i>Special Needs Trust</i>	\$600.00
<i>Business Planning</i>	\$250.00/hour
<i>Complex Estate Planning</i>	\$250.00/hour
<i>Specialized Estate Planning</i>	\$250.00/hour
<i>Home Visits (each)</i>	\$200.00
<i>Late Evening (after 5:00 p.m.) and Saturday appts.</i>	\$200.00
<i>Additional Consultations</i>	\$250.00/hour

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POST-PLANNING FUNDING THE TRUST

The post-planning funding of the trust is vitally important. If your assets are not transferred into your trust, then your heirs will have to initiate a probate or conservatorship to get your assets into your trust — and thus you lose one of the main benefits of having a revocable living trust in the first place. You may perform these tasks yourself. However, if you wish us to assist you, our fees are as follows:

<i>Transfer of additional California real estate, per parcel (includes recording fees)</i>	\$275.00
<i>Coordinate transfer of out-of-state properties with out-of-state attorney, per parcel (The out-of-state attorney's fees, and the out-of-state recording fees are extra and will vary by state).</i>	\$200.00
<i>Transfer stock of close corporation, each</i>	\$250.00
<i>Transfer securities not in an investment account, each</i>	\$350.00
<i>Transfer investment accounts, each</i>	\$350.00
<i>Preparation of Change of Beneficiary Form, each</i>	\$95.00
<i>All other funding services, including, but not limited to: mobile homes, boats, personal watercraft, limited liability company memberships, limited partnership interests, partnership interests, and professional business entities:</i>	\$250.00/hour

PAYMENT METHODS

We accept payment by personal check, cashiers check, money order, and wire transfer.