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WHAT IS THE FEE FOR AN ESTATE PLAN?

I offer up-front package prices on living trusts and wills. That way, you know your total investment before you authorize completion of your estate plan. I will analyze your needs and goals and outline, design, and implement a plan which will meet your goals in the most beneficial and cost-effective way with the least possible paperwork.

An estate plan can typically be completed within three weeks after the initial consultation. At our initial meeting we will discuss your individual situation and your goals. I will then analyze your situation and recommend estate planning steps to accomplish your goals. I will provide a written statement of the total cost for your estate plan to you before you decide whether you want to authorize completion of the work. There is no charge if you decide not to hire me at the initial meeting.

If you decide to hire me, at the end of the initial appointment we will schedule another appointment several weeks later. I will draft your estate plan and mail copies of the important documents to you before the second appointment so you can review everything at home. At the second and final appointment, I will explain the documents in detail before you sign them. If your estate plan includes a trust package, I will give you a custom binder covering all the information on the estate plan. Your estate plan is then complete.

My living trust package includes the following:

1. A revocable living trust agreement that eliminates probate and the need for conservatorship proceedings for all assets transferred into the trust.
2. Durable power(s) of attorney allowing a spouse or anyone else you choose to sign documents and handle affairs for you. This document is helpful if mental or physical disability prevents you from managing your own affairs.
3. Durable power(s) of attorney for health care directing physicians and family members regarding continuation of life support systems.

4. Pourover will(s) ensuring that all property is transferred to your chosen beneficiaries, even if an asset is not transferred to your trust during your lifetime.
5. Preparation of deeds to transfer your real estate into the trust, including recording the deeds at the appropriate Register of Deeds.
6. Letters providing all necessary information to your bank, stockbroker, insurance agent or other institutions enabling you to transfer assets into your trust by simply filling in the blanks with pertinent information, delivering letters to appropriate institutions, and signing any forms required by them. I analyze proper titling and beneficiary designations for all of your assets and draft letters with instructions appropriate for your plan.
7. A three-ring binder containing all necessary documents and directions regarding procedures to follow if someone becomes incompetent or if there is a death. Also included are various other informational documents, as well as forms which can be completed stating where assets are located, wishes for memorial services, and any other information which you consider pertinent.
8. Personalized service from me and my assistants, answering all your routine estate-planning questions at no additional cost forever.

My will package includes the following when applicable:

1. Will(s) ensuring that all property is transferred to your chosen beneficiaries.
2. Durable power(s) of attorney.
3. Durable power(s) of attorney for health care.
4. Personalized service from me and my assistants, answering all your routine estate-planning questions at no additional cost forever.

Range of Package Prices

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| 1. | Simple will package. | \$500 to \$600 |
| 2. | Will package with provisions for minors. | \$500 to \$800 |
| 3. | Will package with estate tax planning. | \$1,000 to \$2,000 |
| 4. | Trust package without estate tax planning. | \$1,500 to \$2,000 |
| 5. | Trust package with estate tax planning. | \$2,000 to \$4,000 |
| 6. | Trust or will package with estate tax planning, where business planning or other special needs exist. | <i>(Fees will vary with complexity.)</i> |

Sincerely,

Tracy M. Thompson
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