Custom Build the Right Estate Plan
For you & Your Loved Ones

	BASIC	STANDARD	PREMIUM
Living Trust (Basic has outright distribution only and same distribution for both spouses; Standard and Premium[1] include protective trusts for heirs, multiple asset transfers; see below)[2]	☑	☑	☑
Pour-over Will(s)	☑	☑	☑
Property Agreement (if married)	☑	☑	☑
Deeds, Transfer Letters and Assignments[3]	☑	☑	☑
Durable Power of Attorney	☑	☑	☑
Advance Health Care Directive	☑	☑	☑
HIPAA Authorization	☑	☑	☑
Family Planning Directives	☑	☑	☑
FREE Checkup Meeting Every 3 Years	☑	☑	☑
FREE Consultation with Trustee at Disability & Death	☑	☑	☑
FREE Consultation with Affiliated Financial Advisors		☑	☑
Protective Trusts for Heirs - Staged Distribution, Lifetime, Spendthrift or Special Needs Trusts		☑	☑
Insurance Irrevocable Trust (if applicable)			☑
Charitable Remainder Trust (if applicable)			☑
Capital Gains Protective Trust (if applicable)			☑
Personal Asset Trust (if applicable)			☑
Advanced-Level Estate, Tax & Asset Protection Meeting			☑
FIXED FEE			
Single Person	**$3,695**	**$4,595**	**$6,450**
Married Couple	**$4,495**	**$5,495**	**$7,450**
LLCs or other Asset Protection Planning Vehicles	**$1,500 each,[3] includes 1 year of LLC management compliance service**		
Amendment, New or Reinstatement Existing Client	Fixed Fee - quoted after review		

1 Basic and Standard are fixed fee provided no more than 2 sets of revisions requested. It is very important that client provide all asset information in the application. If more than 2 sets of revisions are required, client will be billed at the attorney's hourly rate.

2 Premium is not set on a fixed fee; it anticipates more than Standard Asset Transfers, including multiple generation planning, and succession planning for businesses.

3 Often substantial additional time incurred, expecially where assets are located in states other than California. Our office does everything we can to coordinate with lenders within the 3 transfer limit. All transfers over the 3 transfers limit are billed at $200 per transfer.

~Additional non-fixed fee: Estate Administration - hourly, but generally performed by paralegals at $200/hr.

4 Fixed fee does not include recording, notary, Franchise Tax Board, or Secretary of State fees.