



# Estate Planning Services and Pricing Guide



## Basic Will Package

### Individual

|                 |              |
|-----------------|--------------|
| Due up front    | \$249        |
| Due at delivery | \$250        |
| <b>Total</b>    | <b>\$499</b> |

### Married

|                 |              |
|-----------------|--------------|
| Due up front    | \$498        |
| Due at delivery | \$250        |
| <b>Total</b>    | <b>\$748</b> |

### Package Includes:

- Last Will and Testament
- Financial Power of Attorney
- Healthcare Power of Attorney
- Cloud Storage and Sharing
- Notarization by Richard M. Allison

## Trust Package

### Individual or Married

|                 |                |
|-----------------|----------------|
| Due up front    | \$500          |
| Due at delivery | \$699          |
| <b>Total</b>    | <b>\$1,199</b> |

### Additional Costs

|                       |       |
|-----------------------|-------|
| Real Estate Retitling | \$199 |
| Amendment to Will     | \$149 |
| Amendment to Trust    | \$199 |

### Package Includes:

- Revocable Living Trust
- Certification of Trust
- Pour-Over Wills
- Financial Power of Attorney
- Healthcare Power of Attorney
- Cloud Storage and Sharing
- Notarization by Richard M. Allison

## Estate Planning Steps

1. **Appointment Prep:** You will receive the Estate Guru Estate Planning Appointment Guide to complete, so you are prepared for the first appointment.
2. **Data Input Appointment:** We will ask you questions and guide you through the information needed for the Estate Guru affiliated attorney who will create your legal documents.
3. **Document Creation (2 weeks):** The Estate Guru affiliated attorney will review your estate needs and approve the creation of your legal documents. Your Estate Planning documents package will be sent to our office to be reviewed, signed, and notarized during your follow up appointment. In some situations, the Estate Guru affiliated attorney may need to follow up with you to ask clarifying questions.
4. **Execution and Funding:** We will provide suggestions on how to make sure your estate plan is executed and funded. (We can assist in re-titling accounts in your new trust name via our relationships with Altruist, LLC or Charles Schwab & Co., Inc. Real Estate Re-titling is available for an extra fee as shown above.



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