



Estate Planning Services and Pricing Guide



Basic Will Package

Individual

Due up front	\$249
Due at delivery	\$250
Total	\$499

Married

Due up front	\$498
Due at delivery	\$250
Total	\$748

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
Total	\$1,199

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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