



Estate Planning Services and Pricing Guide

Basic Will Package

Individual

Due up front
Due at delivery
Total

Married

Due up front
Due at delivery
Total

Package Includes:

- Last Will and Testament
- Financial Power of Attorney
- Healthcare Power of Attorney
- Cloud Storage and Sharing

Trust Package

Individual or Married

Due up front
Due at delivery
Total

Additional Costs

Real Estate Retitling
(Online service per property)

Package Includes:

- Revocable Living Trust
- Certification of Trust
- Pour-Over Wills
- Financial Power of Attorney
- Healthcare Power of Attorney
- Cloud Storage and Sharing

Estate Planning Steps

1. **Appointment Prep:** You will receive the 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 creating the basis of your estate plan.
3. **Document Creation (2 weeks):** Our attorney will review your estate needs and create the legal documents. Your estate planning package will be sent to our office to be reviewed, signed, and notarized during your follow up appointment. *In unique situations, our attorney may need to follow up with you to ask clarifying questions.*
4. **Execution and Funding:** We will work with you to make sure your estate plan is executed and funded.

