

# SWEET, MAIER & COLETTI, S.C.

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wisclaw.com

[Effective: January 1, 2010]

## I. Custom Will-Based Estate Plan Fees\*

- Will Plan for Individual w/Outright Gifts to Beneficiaries \$ 500.00
- Will for Individual w/Testamentary Trust (a Trust which is written Into your Will, and funded at death) for Beneficiaries \$ 600.00
- Will Plan for Couple w/Outright Gifts to Beneficiaries \$ 700.00
- Will Plan for Couple w/Testamentary Trusts for Beneficiaries \$ 800.00
- Will Plan for Individual or Couple w/Complex Estate Tax Planning Quoted

### *Your Custom Trust-Based Will Plan Includes:*

1. Initial Consultation
2. Will
3. Durable Power of Attorney for Property and Finances
4. Durable Power of Attorney for Health Care
5. Memorandum for Distribution of Tangible Personal Property
6. In-person or Phone Meeting to Review First Drafts
7. One Revision of First Drafts
8. Signing Ceremony
9. Document Organizer
10. Copies of Original Documents

**\*NOTE:** *During the initial consultation, and thereafter as appropriate, your attorney will discuss any alternatives available to you for your consideration. If these alternatives would involve additional work, tax planning, or documents, before any such work is undertaken, your approval will be sought, and you will be advised what additional cost is involved. Following the initial consultation, we will provide you with written confirmation of: (i) what services we will provide to you; and (ii) the cost thereof, in the form of a written Legal Representation Agreement.*

**Installment payment plans, as well as payment via Visa, MasterCard & Discover charge cards are available for payment of our professional charges.**

## **II. Custom Trust-Based Estate Plan Fees\***

- Trust Plan for Individual \$1,250.00
- Trust Plan for Couple \$2,000.00
- Trust Plan for Couple w/Marital Property Agreement \$2,500.00
- Trust Plan for Individual Couple w/Complex Estate Tax Planning Quoted

### ***Your Custom Trust-Based Estate Plan Includes:***

1. Initial Consultation
2. Revocable Living Trust
3. Will
4. Durable Power of Attorney for Property and Finances
5. Durable Power of Attorney for Health Care
6. Transfer to Trust Memorandum
7. Memorandum for Distribution of Tangible Personal Property
8. Trust Funding Instruction Letter
9. Deed in Trust for Residence
10. Recording of Deed [Recording fee (usually \$11.00) will be added to invoice]
11. In-person or Phone Meeting to Review First Drafts
12. One Revision of First Drafts
13. Signing Ceremony
14. Document Organizer
15. Copies of Original Documents

**\*NOTE:** *During the initial consultation, and thereafter as appropriate, your attorney will discuss any alternatives available to you for your consideration. If these alternatives would involve additional work, tax planning, or documents, before any such work is undertaken, your approval will be sought, and you will be advised what additional cost is involved. Following the initial consultation, we will provide you with written confirmation of: (i) what services we will provide to you; and (ii) the cost thereof, in the form of a written Legal Representation Agreement.*

### **III. Fees for Advanced Estate Planning\***

● Special Needs Trust	Quoted
● 2503(c) Minor's Gift Trust	\$1,000.00
● Educational Trust for Children/Grandchildren	\$1,000.00
● Irrevocable Life Insurance Trust	\$1,600.00
● Grantor Retained Annuity Trust	\$1,750.00
● Qualified Personal Residence Trust	\$2,000.00
● FLP or FLLC for Estate Planning	\$3,500.00
● Charitable Remainder or Lead Trust	\$1,750.00

**\*NOTE:** *Our Firm will meet with you and make a recommendation on what type of estate plan we think is best. At that time, we will establish a firm price for these services, and a written Legal Representation Agreement will be prepared and entered into between the Firm and its Client.*

#### **IV. Fees for Miscellaneous Services\***

• Will	\$ 300.00
• Complex Will	Quoted
• Trust Funding Services	Quoted
• Trust Amendment(s)	Quoted
• Will Codicil(s)	Quoted
• Review of Existing Estate Planning Documents for Any Recommended Amendments	\$ 325.00
• Durable Power of Attorney for Property	\$ 100.00
• Power of Attorney for Health Care	\$ 100.00
• Basic Living Will	\$ 100.00
• Complex Living Will	Quoted
• Anatomical Gifting Declaration	\$ 75.00
• Direction for Disposition of Remains	\$ 125.00
• Marital Property Agreement	\$ 750.00
• Marital Property Agreement (Complex)	Quoted
• Pre-Nuptial Agreement	\$1,500.00
• Pre-Nuptial Agreement (Complex)	Quoted
• Completion of Estate Plan within 7 Days (Expedited Service)	\$ 150.00 extra
• Completion of Estate Plan within 4 Days (Expedited Service)	\$ 250.00 extra
• Completion of Estate Plan within 2 Days (Expedited Service)	\$ 400.00 extra

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