



How Much Should My Estate Plan Cost?

As you can imagine, we get the question “how much should my estate plan cost” quite frequently.

And, it’s a good question that I want to answer for you as clearly as I can, given that there is not a “one-size fits all solution” for every family, and I would run quickly away from any lawyer who *can* tell you exactly what your plan would cost via email or over the phone, without a comprehensive discovery process.

You see, this is exactly why most estate plans fail. Families shop around based on price (because they don’t know any other way to shop for an estate plan), and end up with a traditional plan, which is a set of documents that do not actually work when the family needs them.

If you’d like to read more about this, please read my article here on [“how shopping around for an estate plan could leave your family with an unexpected, expensive, uninvited mess.”](#)

In the meantime, here’s what I can assure you:

We’ve priced our estate planning for you and your family at the intersection of affordability and effectiveness.

We start all of our plans with a Family Wealth Planning Session™, which is designed to get you more financially organized than you have ever been before, and ensure that no matter what happens, none of your hard-earned assets will be lost to the State Department of Unclaimed Property, when something happens to you.

Even if you never do any planning with us, the Family Wealth Planning Session alone is a hugely valuable process for you and your family, because you will create a full inventory of your assets and ensure your family knows what you have.

Then, when we meet in person, we will review everything you own, and discuss everyone you love, and you will understand exactly what would happen to everything you own and everyone you love, in the event of your death or incapacity.

If you do not have a plan, we will cover the plan the State has for you. If you do have a plan, we will review your current plan with you. (We call this an estate plan review and check-up).

If you are not happy with your current plan (or the plan the State has for you), you will tell us what you would want to change, and we will look at the most effective, efficient and affordable way to achieve your goals.



Here's the most important part for you to know about this: you will be making informed, educated, empowered decisions for the people you love, not just shopping around based on price.

And the best part is that as part of this process, you will actually choose your own fee based on your budget and the planning options that are most important to you and your family. There truly is no one size fits all choice.

We have created a process, though, to educate you quickly and effectively so that you can make empowered, informed choices about what you want for the people you love, so that you aren't simply choosing the cheapest option because you don't have any other basis for making your decisions.

Okay, now having said all that, you probably want to at least know a range of what estate planning will cost.

With all of that background in mind:

A Family Wealth Planning Session process is \$750. An Estate Plan Review and Checkup is \$950. Those fees are applicable if you come in fully uneducated without doing any homework ahead of time.

If you'd like to do a little preparation ahead of time and secure your appointment time with a credit card (though nothing is charged on your card so long as you keep your appointment and turn in your homework in advance), you can follow the instructions and schedule [here](#) and use the coupon code indicated to commit that you will do your homework and prepare for the meeting. That saves me time and saves you money.

Our three levels of planning for a comprehensive plan (or update of your existing plan) range between \$2,000 and \$8,000, for a married couple, depending on the choices you make during the Family Wealth Planning Session. If you are single, planning is discounted from there, appropriately.

If after reading this, you are ready to make informed, empowered, educated decisions for the people you love (instead of just shopping around for the cheapest plan, which is unlikely to work when your family needs it), get started by booking your Family Wealth Planning Session (or Estate Plan Review and Check-up) [here](#).