

## **FEE SCHEDULE FOR ESTATE PLANS**

The following represents standard estate planning fees, but situations that do not fit neatly into these “Plans” will require a different fee quote. Also, registry recording fees are not included in the quoted prices.

<u><b>Basic Will Plan</b></u>  \$950 Individual \$1,500 Couple  <i>(Realty Trust with Quitclaim Deed for real estate is an additional \$850, plus registry filing fees)</i>	Includes for each person: <ul style="list-style-type: none"> <li>• Last Will &amp; Testament (a simple Will)</li> <li>• Durable Financial Power of Attorney</li> <li>• Health Care Proxy &amp; Living Will</li> <li>• Personal Property Memo &amp; Remembrance and Services Memo</li> </ul> <p>Basic Wills leave your entire estate to one or more persons, and do not include specific bequests (except for general bequests of tangible personal property), provisions for minor children, or any trust provisions, and provide no tax planning.</p>
<u><b>Living Trust Plan</b></u>  Starts at \$2,500 for an individual + fees  Starts at \$3,000 for a couple + fees	Includes: <ul style="list-style-type: none"> <li>• Revocable Living Trust (Family Revocable Trust if Married)</li> <li>• Last Will &amp; Testament (a “pour over” Will)</li> <li>• Durable Financial Power of Attorney</li> <li>• Health Care Proxy with living will provisions</li> <li>• Personal Property Memo &amp; Remembrance and Services Memo</li> <li>• Quitclaim Deed, Trustee Certificate and Declaration of Homestead for principal residence.</li> <li>• <b><i>This is a probate avoidance plan.</i></b></li> </ul>
<u><b>Living Trust Plan With Tax Planning</b></u>  Starts at \$4,500 + fees	Includes for each person: <ul style="list-style-type: none"> <li>• Revocable Living Trust (Credit Shelter Trust)</li> <li>• Last Will &amp; Testament (a “pour over” Will)</li> <li>• Durable Financial Power of Attorney</li> <li>• Health Care Proxy with living will provisions</li> <li>• Personal Property Memo &amp; Remembrance and Services Memo</li> <li>• Realty Trust, Quitclaim Deed, Trustee Certificate and Declaration of Homestead for principal residence.</li> <li>• Initial assistance with trust funding.</li> <li>• <b><i>This is a probate avoidance plan with tax planning.</i></b></li> </ul> <p>This Plan is for married couples with assets over either the state (\$2 million) or federal (\$13.99 million) estate tax exemption limits. It avoids probate and allows the minimization of estate taxes due after the death of both spouses, and/or the deferment of state estate taxes. For families with sizeable assets, this plan can save hundreds of thousands of dollars for your heirs.</p>
	<u><b>Other Estate Planning Services</b></u>
Starts at \$2,500	Supplemental Needs Trust
Starts at \$2,500	Irrevocable Trust for Long Term-Care purposes or gifting purposes
Starts at \$2,500	Irrevocable Life Insurance Trust
Quoted case by case	Probate
Starts at \$5,000	Mass Health Application & related matters thereto