FEE GUIDE

NorthCoast Law Estate Planning Fees and Services

This guide describes the flat fees for NorthCoast Law Estate Planning services. Most clients receive a final written fee quote after a planning consultation. The fee depends on the client's family circumstances, assets, planning goals, and the work required to implement the plan.

The listed fees cover the standard scope described below. Unusual title issues, tax planning, public benefits planning, business interests, out-of-state property, additional meetings, or substantial revisions may require a custom quote. No additional work is undertaken without the client's approval.

Fee Summary

Service	Fee	Scope note
Planning consultation	**Free**	Free 1 hour consultation
Individual will plan	**$1,500**	One client
Couple reciprocal will plan	**$2,000**	Two spouses with a coordinated plan
Individual revocable trust plan	**$2,500**	Includes one uncomplicated New Hampshire residence deed
Couple joint revocable trust plan	**$4,000**	Includes one uncomplicated New Hampshire residence deed
Couple separate revocable trusts	**From $5,000**	Quoted after the planning consultation
Simple purpose specific irrevocable trust	**From $5,000**	Purpose and funding determine the final fee
Medicaid asset protection plan for one	**From $7,500**	Advance planning; Medicaid application not included
Medicaid asset protection plan for a couple	**From $9,000**	Advance planning; Medicaid application not included
Transfer on death deed	**$850**	$500 when added to an estate planning package
Advanced tax or special needs planning	**Custom quote**	Fee depends on the strategy and required coordination

Court, registry, title, appraisal, tax preparation, accounting, and other third party charges are not included unless the engagement agreement states otherwise.

Will Based Estate Plans

A will based plan addresses the disposition of probate assets and appoints people to act during incapacity and after death. A will does not control assets that pass by beneficiary designation, joint ownership, or a valid transfer on death arrangement.

1) Individual Will Plan

Flat fee $1,500

A. Estate planning consultation and review of the client's family, assets, and goals
B. Last Will and Testament, including guardian nominations and continuing trusts when appropriate
C. Durable financial power of attorney
D. New Hampshire Advance Directive, including the health care agent appointment and living will provisions
E. HIPAA authorization and tangible personal property memorandum
F. Basic review of asset titling and beneficiary designations
G. One substantive revision round, supervised signing, and paper copies

2) Couple Reciprocal Will Plan

Flat fee $2,000

This package includes the individual will plan documents for each spouse, a coordinated review of jointly and separately owned assets, and reciprocal wills that remain individually revocable. It is intended for spouses whose estate planning goals are substantially aligned.

A blended family, materially different distribution plan, prenuptial agreement, significant separate property, or conflict between the spouses may require a custom fee or separate representation.

Revocable Trust Plans

A revocable trust can provide incapacity management and may avoid probate for assets properly transferred to the trust. Signing the trust alone does not fund it. The package therefore includes a written funding plan and limited implementation work.

1) Individual Revocable Trust Plan

Flat fee $2,500

2) Couple Joint Revocable Trust Plan

Flat fee $4,000

3) Couple Separate Revocable Trusts

Fee Starting at $5,000

Each revocable trust package includes:

A. The applicable will plan documents for each client
B. Revocable trust agreement and certification of trust
C. Pour over will for each settlor
D. Assignment of tangible personal property and a trust property schedule

E. Trustee succession, incapacity, digital asset, and beneficiary provisions
F. Written asset funding plan and review of retirement, annuity, investment, and insurance beneficiary designations
G. Preparation and recording coordination for one uncomplicated New Hampshire residence deed
H. One substantive revision round, supervised signing, and a post signing funding follow up

Note: Registry fees, title searches, title certification, corrective deed work, additional properties, lender requirements, and out-of-state deed work are charged separately. Retirement accounts are not automatically retitled to a trust; their treatment depends on the client's tax and beneficiary planning.

Irrevocable Trust Plans

Irrevocable trusts are designed for a specific purpose. The appropriate terms, funding method, tax treatment, and trustee structure depend on the client's goals. A planning consultation is required before a final fee can be quoted.

1) Simple Purpose Specific Irrevocable Trust

Fee Starting at $5,000

2) Medicaid Asset Protection Plan

Fee Starting at $7,500 for one client and $9,000 for a couple

3) Advanced Planning

Requires Custom quote

Advanced planning includes tax oriented trusts, certain special needs trusts, life insurance trusts, and other strategies requiring extensive coordination with tax, financial, or benefits professionals.

An irrevocable trust engagement may include:

A. A written review of the trust's purpose and the assets proposed for transfer
B. Trust agreement, certification, trustee acceptance, and succession documents
C. An EIN application when required
D. A funding schedule and one uncomplicated New Hampshire deed when included in the written scope
E. Coordination instructions for the client's accountant and financial adviser
F. Updated will, powers of attorney, and Advance Directive when included in the written scope
G. An initial trustee administration memorandum

Unless specifically included in the engagement agreement, these fees do not cover Medicaid applications, crisis planning, appraisals, income or gift tax returns, Form 709 preparation, annual notices, annual trust administration, accountings, or later amendments.

Transfer on Death Deeds

1) Standalone Transfer on Death Deed

Flat fee $850 plus recording and title expenses

2) Transfer on Death Deed Added to a Plan

Flat fee $500 plus recording and title expenses

The service includes review of the existing deed and current ownership, selection of primary and contingent beneficiaries, preparation of the deed, execution instructions, recording coordination, and a written summary of the beneficiary's post death steps.

Before preparing the deed, the attorney will determine whether a transfer on death deed is consistent with the client's will, trust, joint ownership, creditor concerns, and intended distribution. A title examination, title opinion, corrective deed, or dispute concerning ownership is outside the standard fee.

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NEW HAMPSHIRE ESTATE PLANNING SERVICES

Additional Services and Charges

A. Additional uncomplicated New Hampshire deed: generally $500 plus expenses
B. Additional meetings, substantial revisions, funding implementation, or services outside the written scope: generally $350 per hour
C. Rush service: quoted in advance based on the requested completion date
D. Out-of-state real estate: local counsel and recording costs are additional
E. Title searches, certified copies, registry charges, tax stamps, appraisals, tax returns, and other third party expenses are billed separately

When a Custom Quote Is Required

A custom quote may be required for blended families, nonreciprocal plans, beneficiaries receiving means tested benefits, a noncitizen spouse, business or farm interests, substantial lifetime gifts, potential estate tax exposure, contested capacity, family conflict, unusual title issues, or real estate in another state.

Fees and Representation

The flat fee is tied to the work described herein or via Attorney Client Engagement Agreement. If the client's circumstances or requested work change, any additional fee will be discussed before the additional work begins.

If Attorney and Client desire a written engagement agreement, that agreement controls the scope of representation and the final fee. Advance fees are handled and earned as described in that agreement and applicable law. Work begins after that engagement agreement is signed and any required advance payment is received.

This fee guide is informational. It is not a legal opinion, a binding fee quote, or an agreement to provide legal services. Fees may be revised for future engagements or upon agreement.

Beginning the Planning Process

The first step is a planning consultation. Clients should bring or provide their current estate planning documents, deeds, recent account statements, beneficiary designations, insurance information, and a list of the people they are considering as fiduciaries and beneficiaries.