

Estate Planning Services

offered through SNUG self help platform

Basic Will Package

Individual **\$400**

Package Includes:

- Last Will and Testament
- Power of Attorney
- HIPAA Authorization
- Living Will
- 1 year of updates
- Digital Storage
- Notary Signing

Trust Package

Individual or Married **\$1,400**

Additional Costs

Real Estate Retitling service \$200
(service per property)

Package Includes:

- Revocable Living Trust
- Certification of Trust
- Living Will
- Power of Attorney
- Pour over will
- HIPAA Authorization
- Quitclaim Deed
- Digital Storage
- Estate Notary Signing

Estate Planning Steps

- 1.) **Appointment Prep:** To begin, you'll need to gather all of your personal, financial and legal documents. Have them for your first appointment with your advisor.
- 2.) **Data Input Appointment:** Our simple questionnaire will then guide you in creating the basis of your estate plan.
- 3.) **Document Creation:** Create an account through our website and create your plan Online. You select the plan, all of the documents you want prepared. Once completed, you pay for the service on the site and set up your notary appointment.
- 4.) **Execution and Funding:** We will work with you to ensure your estate plan is executed and funded.

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