

VERSTEGEN & FOBE
2018 FEE SCHEDULE
ESTATE PLANNING PACKAGES

WILL PACKAGE FOR SINGLE INDIVIDUAL **\$1,500**

Estate Plan Summary, Last Will and Testament (with guardian nominations for minor children), General Durable Power of Attorney (including Statutory Financial Power of Attorney), Advance Medical Directives (Nomination of Health Care Agents, Living Will, Guardianship avoidance, Medical Records Release).

WILL PACKAGE FOR COUPLES **\$3,000**

Estate Plan Summary, Last Will and Testament (with guardian nominations for minor children), General Durable Power of Attorney (including Statutory Financial Power of Attorney), Advance Medical Directives (Nomination of Health Care Agents, Living Will, Guardianship avoidance, Medical Records Release).

TRUST PACKAGE FOR SINGLE INDIVIDUAL **\$2,000**

Estate Plan Summary, Trust Abstract/Certification, Individual Revocable Trust, Pour-Over Will (with guardian nominations for minor children), General Durable Power of Attorney (including Statutory Financial Power of Attorney), Advance Medical Directives (Nomination of Health Care Agents, Living Will, Guardianship avoidance, Medical Records Release), Asset transfer forms/instructions (up to 10) *excluding* deeds.

JOINT TRUST PACKAGE FOR COUPLES **\$3,500**

Estate Plan Summary, Trust Abstract/Certification, Joint Revocable Family Trust, Two Pour-Over Wills (with guardian nominations for minor children), Two General Durable Powers of Attorney (including Statutory Financial Powers of Attorney), Two sets of Advance Medical Directives (Nomination of Health Care Agents, Living Wills, Guardianship avoidance, Medical Records Release), Asset transfer forms/instructions (up to 15) *excluding* deeds.

SEPARATE TRUST PACKAGE FOR COUPLES **\$4,000**

Estate Plan Summary, Trust Abstract/Certification, Two Separate Revocable Trusts (with optional bypass, marital, QDOT Provisions), Two Pour-Over Will (with guardian nominations for minor children), Two General Durable Powers of Attorney (including Statutory Financial Powers of Attorney), Two sets of Advance Medical Directives (Nomination of Health Care Agents, Living Will, Guardianship avoidance, Medical Records Release), Asset transfer forms/instructions (up to 20) *excluding* deeds.

MISCELLANEOUS FEES AND FIRM BILLING POLICIES¹

• Non-refundable Initial Consultation Fee (45 minutes)	\$250 ²
• Deed preparation (excluding recordation fees)	\$300 per deed
• Deed retrieval	\$25 per deed
• Post signing communications (minimum ½ hour)	\$350 per hour
• Additional review meeting (up to 1 hour)	\$350
• File reactivation after 60 days (includes 1 hour meeting)	\$350
• Mortgage opinion letters	\$200
• Certificat de Coutume	\$200
• Estate and Trust Administration	\$350/\$150 per hour
• Storage retrieval fee	\$50
• Storage retrieval fee + copying + mailing	\$100
• Signing cancellation with less than 3 days notice	\$350
• Meeting cancellation within 48 hours	\$100
• Flash Drive with signed documents	\$100
• Storage fee of duplicate original documents	\$100 (until 12/21)

- Valid credit card number must be on file during the course of representation. Clients will always have the choice of which payment method to use and will be notified if credit card is being charged.
- Credit Card payments are subject to 5% surcharge. Clients paying by credit card expressly waive the right to use the credit card's charge back process and expressly agree that funds will be deposited in the firm's operating account.
- The final installment is due at the earlier of 1) the signing or 2) 60 days after sending final drafts.
- Termination of relationship: attorney and clients may terminate attorney-client relationship in writing. Clients will be charged immediately for all completed work. If no documents are signed, the full estate plan fee including deed fees will be payable minus \$350 for the signing meeting and deed recordation charges.
- Client Referral Policy: Clients referring other clients will be entitled to either a complementary flash drive with scans of all estate planning documents or free storage of duplicate documents until renew period.
- All fees are non-refundable and represent payments of services performed or time spent and are payable at the end of all meetings.
- Advance payment, including penalty, is required to reschedule meetings due to no-shows or last minute cancellations.
- **Hourly Attorney Rate:** \$350 per hour applies to meetings exceeding one hour; requests for excessive revisions and requests for research and lengthy written explanations, client communications after the signing; communications with accountants, financial advisers, client family members.
- **Hourly Paralegal Rate:** \$150 per hour for post signing requests.

¹ Fees and policies are subject to change.

² Will be credited towards the drafting of estate planning documents provided intake meeting takes place within 60 days of initial consultation.