

VERSTEGEN & FOBE
2018 FEE SCHEDULE
REVIEW MEETINGS AND AMENDMENTS

- One hour Review Meeting without amendments. \$350¹

- Amendment package for ***Single Will-based Plan***: \$750
Includes meetings (review and signing) and updating of Estate Plan Summary, Will, Power(s) of Attorney and Health Directives.

- Amendment package for ***Separate (2) Will-based Plan***: \$1,000
Includes meetings (review and signing) and updating of Estate Plan Summary, Wills (2), Power(s) of Attorney (2) and Health Directives (2).

- Amendment package for ***Single Trust-based Plan***: \$850
Includes meetings (review and signing) and updating of Estate Plan Summary, Asset Schedule, Trust, Pour-Over Will, Power(s) of Attorney and Health Directives.

- Amendment package for ***Joint Trust-based Plan***: \$1,000
Includes meetings (review and signing) and updating of Estate Plan Summary, Asset Schedule, Joint Trust, Pour-Over Wills (2), Power(s) of Attorney (2) and Health Directives (2).

- Amendment package for ***Separate Trust-based Plan***: \$1,500
Includes meetings (review and signing) and updating of Estate Plan Summary, Asset Schedules (2), Trusts (2), Pour-Over Wills (2), Powers of Attorney (2) and Health Directives (2).

¹ Fee is applied toward the cost of drafting the amendments if amendments are initiated at the meeting.
A retainer of at least one half the fee is paid at the Review meeting and the balance is payable at the signing.

MISCELLANEOUS FEES AND FIRM BILLING POLICIES²

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| • Deed preparation (excluding recordation fees \$28/\$40/\$60) | \$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 |
| • 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 |
| • Safekeeping of duplicate originals | \$100 (until 12/21) |
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- 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 complimentary 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.

² Fees and policies are subject to change.