

PRICING

Online Estate Planning

HARGROVE POWERED BY **netlaw™**
FIRM

Essential Planning Package

PACKAGE PRICE:

\$2,500

The Essential Planning Package includes the counsel of an attorney licensed in your state. This package is designed for simple will-based or trust-based plans with straightforward disposition of assets.

Planning included:

- Will or Pour-over Will
- Probate Avoidance Living Trust
- Options for outright distribution to beneficiaries or Descendant's Trust with flexible vesting ages
- General Durable Power of Attorney
- Advanced Care Directive (Living Will)
- Healthcare Surrogate Designation
- HIPAA Authorization

Advanced Planning Package

PACKAGE PRICE:

\$3,500

Clients with more complex planning needs, including a desire to asset protect the legacy they leave their kids and/or grandkids, will be interested in the Advanced Planning Package.

Planning includes Essential Package PLUS:

- Counsel from a Tax-focused attorney
- A-B or Disclaimer Trust Planning
- Asset Protection Trusts for kids/grandkids to protect the legacy to kids and/or grandkids from:
 - Spousal interests of kids/grandkids
 - Creditors of kids/grandkids
 - Estate/Inheritance in kid/grandkids estates

Features & Benefits - All estate planning packages include the following:

- Counsel of experienced attorneys and paralegals
- Streamlined intake process
- Convenient virtual meetings
- Execution support, including online options
- Secure document fulfillment and storage
- Funding guidance
- Spouse's plan included at no additional cost

Additional Trusts & Planning

Additional documents and planning may be recommended by Hargrove Firm's Advanced Planning Attorneys.

Irrevocable Life Insurance Trust (ILIT)	\$3,500*
Spousal Lifetime Access Trust (SLAT)	\$3,500*
Family Gifting Trust	\$3,500*
Supplemental Needs Trust	\$3,500
IRA/Pension Trust	\$3,500
Medicaid Trust	\$5,000
Charitable Remainder Trust	\$3,500 (\$7,500 with Charitable LLC)
Beneficiary Defective Inheritor's Trust (BDIT)	\$7,500+
LLC Set-up (with Corporate Transparency Act Compliance)	\$3,500

*Included in base price of Private Wealth Counsel

Private Wealth Counsel

Private Wealth Counsel is tailored for families with substantial wealth, offering bespoke solutions for complex estate and tax planning needs. The initial retainer fee includes all services from the Advanced Planning Package, plus the creation of an irrevocable trust. Additionally, you will work with a dedicated Plan Architect who has deep experience in high-net-worth, complex planning, to help design your plan. This package provides a full-service approach with a comprehensive suite of private wealth planning services.

Examples of related documents and planning include:

SLATs
ILITs
Gifting Trusts
Charitable Trusts
Special Need Trusts
Pension/IRA Trusts
BDITs & BDOTs

\$5,000 INITIAL RETAINER FEE

\$10-25K+

total fees on average

Standalone Irrevocable Life Insurance Trust

Clients can establish a standalone Irrevocable Life Insurance Trust (ILIT). The ILIT will come with an EIN issued within 48 hours of the execution of the trust.

\$3,500

Deed Transfers

Clients of Hargrove Firm have access to deeds transfers at cost. Pricing includes filing of the deed. Deed transfers are processed within two business days, or in one business day for an additional \$100 charge.

\$450

Quitclaim deed

\$525

Warranty deed

Interested in getting started?

Speak with your financial advisor about working
with Hargrove Firm through NetLaw.

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HARGROVE FIRM RESERVES THE RIGHT TO ADJUST PRICING ACCORDINGLY. ADDITIONAL FEES MAY APPLY FOR MULTIPLE STATE PLANNING. SPOUSE IS INCLUDED AT NO COST PROVIDED BOTH ARE RESIDENTS OF THE SAME STATE.