



The Explore Plan



For clients who want their health care wishes turned into directives and want to give a trusted friend or family member the ability to use the clients' assets for the clients' benefit with a durable power of attorney. The Explore Plan is appropriate for clients who do not have any assets that would be subject to probate and who want a simple distribution of their assets at death. These clients are typically single individuals or couples without children.

The Explore Plan Includes:

- Three (3) telephone or in-person attorney meetings (Data Gathering, Design Review, and Document Execution)
- Review of current estate planning documents (if any)
- Last Will and Testament(s)
- Durable (Financial) Power(s) of Attorney
- Health Care Power(s) of Attorney
- Living Will(s)
- HIPAA Release(s)
- Personal Property Memorandum(s)
- Remembrance and Services Memorandum(s)
- Detailed asset titling recommendations
- Recommendations for beneficiary designations
- USB drive with electronic copies of documents

Fee Range: Individual - \$1,000 - \$1,500 | Couple - \$1,500 - \$2,000 *

* Fees are subject to attorney discretion and may change.

The Ascent Plan



For clients who want to minimize or eliminate the need for guardianship or probate proceedings. Their assets will be administered for the clients' benefit during life and, upon the clients' death, transferred to beneficiaries as efficiently as possible or held in trust if desired. The Ascent Plan is appropriate for clients with complex assets (such as closely held businesses, retirement accounts and life insurance), blended families and/or estate tax exposure. The Ascent Plan requires clients to follow through on asset titling recommendations and changes to beneficiary designations without the assistance of our office.

Everything the Explore Plan includes PLUS



- Revocable Trust(s)
- Certification(s) of Revocable Trust
- Assignment(s) of Personal Property to Revocable Trust

Fee Range: Individual - \$2,500 - \$3,000 | Couple - \$4,500 - \$6,000 *

** Third-party costs (deed preparation, filing fees, etc) are not included in the quoted fee.

The Summit Plan



For clients who want the most comprehensive estate planning experience, including proactive assistance in the implementation of their asset titling recommendations and changes to beneficiary designations. The Summit Plan is also appropriate for families with multigenerational wealth, who may require additional planning to reduce or eliminate estate tax. It provides a strong base upon which other advanced estate planning can be done.

Everything the Explore Plan AND Ascent Plan includes PLUS



- One (1) additional in-person attorney meeting (Trust Funding)
- Transfer of assets to Revocable Trust(s) in line with asset titling recommendations**
- Coordination with client's outside advisors to execute recommendations

Fee Range: Individual - \$3,500 - \$5,000 | Couple - \$6,500 - \$9,000 *