Estate Planning
Services and Pricing Guide

Basic Will Package

INDIVIDUAL

Due upfront	$249
Due at delivery	$150
Total	**$399**

MARRIED

Due upfront	$498
Due at delivery	$300
Total	**$798**

PACKAGE INCLUDES

- Last Will and Testament
- Financial Power of Attorney
- Healthcare Power of Attorney
- Cloud Storage and Sharing

Trust Package

INDIVIDUAL OR MARRIED

Due upfront	$699
Due at delivery	$1,000
Total	**$1,699**

ADDITIONAL COSTS

Real Estate Retitling (Online service per property)	$199

PACKAGE INCLUDES

- Revocable Living Trust
- Certification of Trust
- Pour-Over Wills
- Financial Power of Attorney
- Healthcare Power of Attorney
- Cloud Storage and Sharing

Estate Planning Steps

1. **Appointment Prep:** To begin, you'll fill out our Estate Planning Appointment Guide before your first appointment.
2. **Data Input Appointment:** Our simple questionnaire will then guide you, your financial advisor and attorney in creating the basis of your estate plan.
3. **Document Creation**: An attorney from our vast legal network will review your estate needs and create the necessary legal documents. Your estate planning package will then be sent to our office to be reviewed, signed and notarized during your follow-up appointment. In unique situations, our attorney may need to follow up with you to ask clarifying questions.
4. **Execution and Funding:** We will work with you to ensure your estate plan is executed and funded.

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