



We offer three estate plan packages so everyone can create the plan that best meets their circumstance:

Basic Estate Plans are priced to be the most affordable and ensure everyone has an opportunity to establish their own estate plan. Our Basic Plan provides essential and basic planning for individuals who desire or need personal care during their lifetime, the statutory authority for it, and simple instructions to agents. A Basic plan includes outright distributions and trusts for minor or disabled beneficiaries.

Standard Estate Plans provide essential and basic planning for individuals who desire or need personal care during their lifetime but include more details. The Standard Plan includes meetings with our attorneys, opportunities to edit the statutory authority, instructions to agents, and providing asset protection for spouses and children. A Standard Plan includes outright distributions and limited additions to our standard documents. The signing (execution) of a Standard Plan is conducted in our office.

Enhanced (Personalized) Estate Plans provide the greatest opportunity for individuals to design a detailed, customized plan that explains their wishes for care during their lifetime and upon death. An Enhanced Trust Plan provides lifetime asset protection of a spouse and children, re-marriage protection, sub-trusts for minor or disabled beneficiaries, staggered distributions, and business succession planning. Attorneys spend substantial time with clients designing their Enhanced Plan and supervise the signing (execution). Enhance Trust Plan clients can also engage our firm to ensure their assets are transferred into their trust and verified and aligned with the trust’s goals and objectives.

Our **Basic Will Plan (“BWP”)** includes

- | | | |
|--|---------------|-----------------|
| • Last Will & Testament with outright distributions | <u>Single</u> | <u>Married*</u> |
| • Statutory Financial Power of Attorney | \$1,000 | \$1,670 |
| • Statutory Advance Directives with Healthcare Power of Attorney containing living will powers | | |

Our **Standard Will Plan (“SWP”)** includes

- | | | |
|---|---------------|-----------------|
| • Last Will & Testament with outright distributions | | |
| • Modified Statutory Financial Power of Attorney | <u>Single</u> | <u>Married*</u> |
| • Modified Statutory Advance Directives with Healthcare Power of Attorney containing living will powers | \$1,500 | \$3,000 |
| • In office Document Signing & Estate Plan Binder | | |

Our **Enhanced Will Plan (“EWP”)** includes

- | | | |
|---|---------------|----------------|
| • Design Meeting and Review Meeting with Attorney | | |
| • Last Will and Testament with outright distributions | | |
| • Specific distribution and detailed remote contingency language | | |
| • Personal Property Memorandum | | |
| • Financial Power of Attorney (expansive with instructions) | | |
| • Healthcare Protection Plan | <u>Single</u> | <u>Married</u> |
| – Healthcare Power of Attorney | \$2,500 | \$4,500 |
| – HIPAA Authorizations | | |
| – Living Will | | |
| • Attorney supervised document signing | | |
| • Estate Plan Binder | | |
| • Will filed with Register of Wills (Maryland) | | |
| • Memorial Instructions, Asset/Document Location List, Instructions to Personal Representatives, and more | | |



Revocable Living Trusts

Our **Standard Revocable Living Trust (“SRLT”) Plan** includes:

- RLT with disability provisions for control and outright distribution at death, and standby trusts for minor or disabled beneficiaries
- Will that pours over into your trust (“Pour Over Will”)
- Financial Power of Attorney (expansive with instructions)
- Healthcare Protection Plan
 - Healthcare Power of Attorney
 - HIPAA Authorizations
 - Living Will

<u>Single</u>	<u>Married*</u>
\$3,500	\$5,000
<i>Add'l \$500 per real property</i>	<i>Add'l \$500 per real property</i>

Our **Enhanced Revocable Living Trust (“ERLT”) Plan** includes:

- RLT with disability provisions for control and outright distribution at death, and standby trusts for minor or disabled beneficiaries
- Will that pours over into your trust (“Pour Over Will”)
- Financial Power of Attorney (expansive with instructions)
- Healthcare Protection Plan
- In-office Document Signing & Estate Plan Portfolio
- Will filed with Register of Wills (Maryland)
- ID Cards
- Health Document Emergency Card
- Trustee Manual
- Free Consultation with Trustee at Disability and Death
- Free Peace of Mind Meeting every 3 Yrs.
- Primary residence transferred into Trust
- Memorial Instructions, Asset/Document Location List, Instructions to Personal Representatives, and more
- Trust Flow Diagram

<u>Single</u>	<u>Married*</u>
\$6,000	\$7,500
<i>Add'l \$500 per real property (not including primary residence)</i>	<i>Add'l \$500 per real property (not including primary residence)</i>

Our **Joint Pour Over Living Trust (“JPOLT”) Plan** *(for blended families)* includes:

- Three Trusts with standby trusts for disabled or minor beneficiaries and lifetime asset protection to spouse and or children:
 - One Joint Pour Over Trust
 - Two Individual RLT Trusts
- Wills that pour over into individual trusts (“Pour Over Will”)
- Financial Power of Attorney (expansive with instructions)
- Healthcare Protection Plan
- In office Document Signing & Estate Plan Portfolio
- Will filed with Register of Wills (Maryland)
- ID Cards
- Health Document Emergency Card
- Trustee Manual
- Free Consultation with Trustee at Disability and Death
- Free Peace of Mind Meeting every 3 Yrs.
- Property Agreement (if applicable)
- Primary residence transferred into Trust
- Memorial Instructions, Asset/Document Location List, Instructions to Personal Representatives, and more
- Trust Flow Diagram

<u>Married</u>
\$9,500

* Fee may be higher if couple does not have the same successor trustees, beneficiaries, minor guardians, etc.



Probate (DC & Maryland only)[†]

- Full Estate Probate \$5,000 minimum[#] or 3% of the estate
- Small Estate Probate \$3,000 minimum[#]
- Foreign/Ancillary Estate \$3,500 minimum[#] or 3% of the local estate
- Estate Accounting \$1,500 minimum (\$300 per hour)

Trust Administration (DC & Maryland only)

Administration/Accounting \$5,000 minimum or 3% of the estate

Guardianship/Conservatorship (DC & Maryland only) \$3,500 minimum (uncontested) per matter

Business/Commercial/General Counsel

(DC & Maryland only)

- Business Formation \$1,500 minimum plus filing fees
- Business Structure & Management Review \$1,500
- Document preparation and review, lease negotiation, risk management, general counsel Retainers start at \$1,500

Litigation (Trust Contest/Will Caveat and Civil)

(DC & Maryland only)

- Consultation \$350 (credited if case is accepted)
- Representation Hourly, Flat Fee or Blended, depending on the case

Miscellaneous

- Deeds *(DC & Maryland only)* \$500 plus Recording Fee
- Estate Plan Document Updates \$375/hour
- Trusts
 - Trust Amendments/Restatement \$500 - \$2,000
 - Funding (Asset Transfer) \$1,000 first ten assets (non-real property); \$100 ea. add'l.
 - Irrevocable Life Insurance Trust \$7,500
 - Special/Supplemental Needs Trust \$4,500 (does not include any court costs or fees)
- Expedited Fee \$500 or 10% of regular fee (greater amount)

Hourly Rates

- Partner/Senior Attorney \$400/hr.
- Attorney \$375/hr.
- Associate \$275/hr.
- Paralegal & Law Intern \$160/hr.
- Legal Assistant \$125/hr.

[†] *Abbreviated/Unsupervised Estate - Hourly Fee is \$350 per hour*

[#] *Minimum retainer (includes \$2,500 Flat Fee for Petition preparation and submission)*