

Custom Build the Right Estate Plan For You & Your Loved Ones

	BASIC	STANDARD	PLUS IRA OR A/B BYPASS
Living Trust (Basic has outright distributions only and same distribution for both spouses; Standard and Premium include protective trusts for heirs; see below)	✔	✔	✔
Pourover Will(s)	✔	✔	✔
Deed, Homestead Affidavit and Assignment (may be additional charge for more than one deed)	✔	✔	✔
Medical Power of Attorney	✔	✔	✔
Directive to Physician	✔	✔	✔
HIPAA Authorization and Release	✔	✔	✔
Statutory Durable Power of Attorney	✔	✔	✔
Declaration of Guardians – Children	✔	✔	✔
Declaration of Guardians – Adults	✔	✔	✔
Trustee Funding Memorandum	✔	✔	✔
Notarization and Storage of Copies	✔	✔	✔
Free Checkup Meeting Every 3 Years	✔	✔	✔
Free Consultation with Trustee at Disability and Death	✔	✔	✔
Sign with an experienced estate planning paralegal (important protection!)	✔	✔	✔
24/7 Access to secured client portal	✔	✔	✔
FREE Consultation with Affiliated Financial Advisors	✔	✔	✔
Protective Trusts for Heirs (Personal Asset Trust SM , Staged Distribution, Lifetime, Spendthrift or Special Needs Trust)		✔	✔
Burial / Cremation Instructions		✔	✔
Property Agreement (if married)		✔	✔
Executor's Manual		✔	✔
Trustee's Manual		✔	✔

IRA Inheritance or A/B Bypass Trust			✓
Beneficiary Manual			✓
Free Advanced-Level Estate Tax and Asset Protection Meeting			✓
FIXED FEE			
Single Person	\$2,295	\$3,295	\$4,750
Married Couple	\$3,295	\$4,295	\$5,750

*Fixed Fee(s) do not include filing fees.