

LEVELS OF ESTATE PLANNING

Our thoughtful estate planning packages provide varying levels of protection, suited to your unique needs and goals

LEVEL ONE FAMILY PLAN

For the Family Who...

Doesn't have assets that would have to go through the probate process but do want to guarantee their children are well cared for no matter what, their health care wishes are turned into directives and their loved ones are able to access their assets using a durable power of attorney if they become incapacitated.

Your Family Plan...

Includes a Will, Advance Health Care Directive, Living Will, and Durable Power of Attorney so you know that you are well taken care of if anything happens.

If you have minor children, it can also include documents and recommendations to help ensure that your children would be raised by the people you want, in the way you want.

Fee Level: \$1,200-\$2,000
per person

LEVEL TWO LIVING TRUST PLAN

For the Family Who...

Wants the total assurance and peace of mind knowing assets will be transferred to heirs with the most ease and convenience possible without making the plan public and without the probate process.

Clients choosing the Living Trust Plan may also be able to protect their beneficiaries' inheritances from lawsuits, judgments, creditors, death, taxes, and divorce.

Your Family Plan...

Includes a Living Trust, Will, Durable Power of Attorney, Advance Health Care Directive, Living Will, and Assignment of Personal Property.

Depending on your circumstances, may also include preparation of deed(s), assignment of business interests, assistance in retitling bank and brokerage accounts, and recommendations regarding beneficiary designations on life insurance policies and retirement accounts.

Fee Level: \$2,500-\$4,500
per person

LEVEL THREE ADVANCED PLAN

For the Family Who...

Is concerned about protecting assets, death taxes, a beneficiary with special needs, or qualifying for Medicaid down the road.

Clients choosing the Advanced Plan may need to establish a business entity (such as a limited liability company), an irrevocable trust, or take other steps to protect their assets for future beneficiaries.

Your Family Plan...

Because each Advanced Plan depends heavily on the type of goals to be accomplished, the documents and services may vary. In general, the Advanced Plan includes preparation of an irrevocable trust or creation of a business entity (e.g., certificate of formation, operating agreement, obtaining a taxpayer identification number, etc.), as well as the documents identified in Level Two. Also includes recommendations regarding funding and ongoing administration of irrevocable trust or business entity.

Fee Level: \$4,500+
per person