



Estate Planning Options



The Will Package

- Simple Will
- Financial Power of Attorney
- Advance Healthcare Directive
- HIPAA Authorization
- Notarization included

\$800 Individual / \$1,600 Couple
Flat Fee

Plan Extras

- A-B Trust Option +\$500
- Beneficiary Trusts +\$250
- Additional CA Deed +\$150
- Out of State Deed +\$300
- Business Assignments +\$75

The Trust Package

Organizational Binder includes:

- Revocable Living Trust (standard)
- Schedule of Assets
- Trust Summary
- Funding Instructions
- Trust Certification
- Declaration of Trust
- Pour-over Will
- Assignment of Personal Property
- Personal Property Memorandum
- Deed Transfer for residence and in person recording at County
- Financial Power of Attorney
- Advance Healthcare Directive
- HIPAA Authorization
- Notarization included

\$1,250 Individual / \$2,500 Couple
Flat Fee

Trust Restatements

- Full Restatement of your current Revocable Living Trust (standard)
- Trust Summary
- Funding Instructions
- Trust Certification
- Declaration of Trust
- Pour-over Will
- Assignment of Personal Property
- Personal Property Memorandum
- Notarization included

\$750 Flat Fee

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