

FEE SCHEDULE

Level I - Planning

Will Centered Estate Planning without Tax Planning Provisions

\$750.00 - \$1,500.00

Includes:

- A Will
- General Power of Attorney
- Health Care Power of Attorney
- Living Will

If married, each spouse's plan includes the above.

Will Centered Estate Planning with Tax Planning Provisions

\$2,000.00 - \$4,500.00

Includes:

- A Will
- General Power of Attorney
- Health Care Power of Attorney
- Living Will
- Letter of Instruction to assist in Changing Beneficiaries

If married, each spouse's plan includes the above.

Medicaid Planning

\$4,500.00 - \$9,500.00

Includes:

- Pre-planning for Medicaid
- Emergency planning, if necessary
- Eligibility Determination
- Spend Down Requirements
- Gifting ability
- Using Irrevocable or Revocable Living Trusts, when applicable

If married, each spouse's plan includes the above.

Living Trust Centered Estate Plan

\$3,500.00 - \$7,500.00

Includes:

- A Revocable Living Trust
- A Will
- General Power of Attorney
- Health Care Power of Attorney
- Living Will
- Affidavit of Trust
- Comprehensive Funding-we are responsible to assure that your trusts are "fully funded"
- Design of your unique planning provisions
- Explanation of each planning tool
- Review of each document
- Six-month meeting

If married, each spouse's plan includes the above.

Level I - Planning (continued)

Annual Meetings **\$500.00 - \$2,000.00**

Includes:

- Annual Amendment to your Living Trust, if necessary, due to changes in goals and objectives
- Technical Amendments, if necessary
- Attorney's "Improvements" in Language to your Living Trust, if necessary
- Review of funding of your Living Trust
- Quarterly newsletter
- Review of your existing plan
- Review of additional estate planning tools which may be useful due to a change in circumstances

If married, each spouse's plan includes the above.

Level II - Advanced Planning - Implementation

Irrevocable Life Insurance Trust (without Level I) **\$2,500.00 - \$5,000.00**

Irrevocable Life Insurance Trust (with Level I Planning) **\$3,500.00**

Family Limited Partnership or Limited Liability Company **\$10,000.00**

Sale to Intentionally Defective Irrevocable Grantor Trust (IDIT) **\$25,000.00**
Includes IDIT and Family Limited Partnership

Charitable Remainder Trust **\$5,000.00**

Charitable Lead Trust **\$5,000.00**

Grantor Retained Trusts and Personal Residence Trusts **\$5,000.00**

Cash Flow Analysis with Gifting Recommendations **\$3,500.00**

Off-Shore Asset Protection Trust **\$25,000.00 - \$50,000.00**

Other Advanced Planning Tools **To be Quoted in Advance**

Wealth Strategies Design Planning Process

To be quoted in advance based on our Billing Philosophy. **Minimum fee of \$7,500.00**
Only appropriate for a client with a net worth of \$5,000,000.00 or more.

All planning includes design of your unique planning provisions, explanation of each planning tool, review of each document, and six-month meeting. Fees do not include filing fees or outside counsel fees.

Post Mortem Administration

.5% of the Value of the Estate as determined for Federal Tax Purposes. Minimum Fee of \$10,000.00, or Hourly at the rates set forth below.

Probate Administration

Hourly Rates Determined as follows:

\$275.00	Principal Attorney
\$165.00	Associate Attorney
\$165.00	Senior Accountant
\$100.00	Junior Accountant
\$88.00	Legal Assistant/Paralegal

Billed monthly pursuant to a fee agreement.

Business Continuation Planning, Business Transactions, Corporate Counsel, ESOPs, ERISA, Probate and Trust Litigation, and Tax Controversies

Hourly Rates Determined as follows:

\$275.00	Principal Attorney
\$165.00	Associate Attorney
\$165.00	Senior Accountant
\$100.00	Junior Accountant
\$88.00	Legal Assistant/Paralegal

Billed monthly pursuant to a fee agreement.



**EAGLE
& FEIN**

ATTORNEYS & COUNSELORS AT LAW