

Fee Schedule and Example Fees **Effective January 1, 2025**

Generally: Effective for new cases initiated after January 1, 2025, my hourly rate will be **\$340.00 per hour**, billed in 0.1 hour (6 minute) increments. I do *not* increase hourly rates on existing cases for potential future rate increases. The rate on the fee agreement is the rate for the duration of the case. However, I am able to quote **flat fees** for most case types.

FOR ESTATE PLANNING, all packages include:

- A. Last Will and Testament
- B. Financial Power of Attorney
- C. Medical Power of Attorney
- D. Living Will
- E. Declaration as to Disposition of Last Remains
- F. Standalone Nomination of Guardian (if applicable)

A consultation up to one hour is free of charge, and I can almost always quote a **flat fee** based on anticipated complexity. By way of example, here are some typical fees for typical scenarios:

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| 1) Single Person, Basic Will Package. | \$900.00 |
| 2) Single Person, Will with Testamentary Trust advisable for minors, young Adults, or disabled beneficiaries | \$1200.00 |
| 3) Married Couple, Basic Will Package (per couple) | \$1200.00 |
| 4) Married Couple, Will with Testamentary Trust advisable for minors, young Adults, or disabled beneficiaries (per couple) | \$1500.00 |
| 5) Single Person, Basic will package plus Revocable Living Trust for probate avoidance and associated trust setup documents | \$2000-\$2500 |
| 6) Married Couple, Basic will package plus Revocable Living Trust for probate avoidance and associated trust setup documents (per couple) | \$3000-\$4000 |
| 7) Sample estate planning additional fees, if needed: Beneficiary Deed or other deeds (\$250.00); Standalone Special Needs/Supplemental Needs Trust (\$1,000.00); LLC/Operating agreement setup/work (\$250.00-\$1,000.00). | |

Payment Timing: For estate planning, I only take payment upon completion of my work. For probate and trust administration, I typically *do not* require up front retainers for uncontested matters, and am agreeable to waiting until the estate/trust has liquid funds available to pay me.

Payment Methods Accepted: I take payment by check, any credit or debit card, cash, Venmo, Paypal, and maybe even cryptocurrency if you would like.

FOR PROBATE/TRUSTS/DECEASED PERSON MATTERS:

- 1) **Probate, with or without will.** If you are the anticipated administrator/executor/personal representative of the estate, and the matter is not contested/disputed, I typically charge a flat fee of **\$3,000.00** to file the case and all necessary pleadings get you appointed by the court, send initial notices to heirs, arrange for initial notice to creditors by publication, write you a lengthy roadmap and checklist to remaining administration of the estate, and make myself available as needed for further advice. After conclusion of flat fee services, the hourly rate of **\$340.00 per hour** applies on the as-needed basis for the remainder of estate administration.
 - a) In many cases, if I assist with a few particular questions, such as creditor claim issues, deeds for closing on sale of a house, review of final accounting, and filing the statement to close the case with the court, my additional hourly fees beyond the flat fee are usually between \$1,000.00 and \$1,500.00.
 - b) Should there be significant beneficiary issues, creditor disputes, or other unforeseen complications, fees can be significantly more.
 - c) Court costs, publication costs, and other expenses of estate administration are not included in my fees and will be billed separately.
 - d) All fees and costs are typically payable out of estate funds when they become available. I do not require an up front retainer for uncontested cases.
- 2) If you have already commenced estate administration and need piecemeal advice, I can provide that on an hourly basis
- 3) Advice on trust administrative matters will be on an hourly basis, but I can usually set you down the right path with only 1-2 hours of attorney time.
- 4) **Beneficiary Rights:** If you are a beneficiary of a trust or estate seeking advice on your rights as a beneficiary rather than administration of the estate, advice will typically be on an hourly basis.
- 5) **Small Estate Administration:** If the value of the estate is less than \$82,000.00 (adjusted each year for cost of living), and there is no real estate, the estate can be administered without probate with the “small estate affidavit.” **Assets that pass via joint ownership or through beneficiary designations do not count toward that threshold number.** I typically charge \$400.00 to provide you with the completed small estate affidavit, a cover letter of explanation for extra leverage with collecting the assets, and up to an hour of my time on general estate advice.