

Comprehensive Flat Rate Estate Planning Packages

Basic Estate Planning Package for an Individual – This package offers one flat rate price for legal advice, estate planning consultation, and completion of four core recommended estate planning documents—Last Will & Testament, Durable Power of Attorney for Finances & Healthcare, Healthcare Directive, and Disposition of Remains (see descriptions on next page)	\$995
Living Trust Planning Package for an Individual – This package offers one flat rate price for legal advice, estate planning consultation, and establishment of a Living Trust for an Individual, as well as Pour Over Will, Durable Power of Attorney for Finances & Healthcare, Healthcare Directive, and Disposition of Remains (see descriptions on next page) *price does not include additional cost of filing Quit Claim Deed for real estate (see next page for details)	\$3,195
Basic Estate Planning Package for a Married Couple and/or Significant Others – This package offers one flat rate price for legal advice, estate planning consultation, and completion of five core recommended estate planning documents for married couples—2X Mirror Last Will and Testaments, Community Property Agreement (if applicable), 2X Durable Powers of Attorney for Finances & Healthcare, 2X Healthcare Directives, and 2X Disposition of Remains (see descriptions on next page)	\$1,695
Complex Estate Planning Package for a Married Couple with estate valued over \$3 million+ – This package offers one flat rate price for legal advice, estate planning consultation, and completion of five core recommended estate planning documents for married couples—2X Mirror Complex Wills with Elective Spousal Trust for estate tax planning, Community Property Agreement, 2X Durable Powers of Attorney for Finances & Healthcare, 2X Healthcare Directives, and 2X Disposition of Remains (see descriptions on next page)	\$2,995
Living Trust Planning Package for a Married Couple – This package offers one flat rate price for legal advice, estate planning consultation, and establishment of a Living Trust for a Married Couple (including QTIP provisions for estate tax planning), as well as Pour Over Wills, Community Property Agreement, Durable Power of Attorney for Finances & Healthcare, Healthcare Directive, and Disposition of Remains (see descriptions on next page) *price does not include additional cost of filing Quit Claim Deed for real estate (see next page for details)	\$5,195

**Price for all packages also includes travel up to 10 miles from office location for the signing appointment (if home or facility signing is requested/required)

**Price DOES NOT include disinterested witness services (separately contracted for \$60/each)

Flat Rate Individual Document Fees

<i>Description of Document/Service</i>	<i>Rate</i>	
	<i>Individuals</i>	<i>Couples</i>
Estate Planning Consultation – There will be a minimum one-hour initial consultation fee for any new incoming client(s) (we are not currently able to offer free consultations). If client(s) move forward with an estate planning totaling more than the \$500 minimum, this cost is applied to the total of representation.	\$400	\$400
Simple Last Will & Testament – Document that distributes your personal and real property after your death and nominates a trust individual to serve as executor of your estate. Service includes: Initial interview; preparation and review of draft; notarization and execution of document that complies with applicable State law	\$550	\$800 (Includes 2 wills)
Intermediate Last Will & Testament – Same as Simple Last Will & Testament (above), but also includes contingent Testamentary Trust for Minor Beneficiaries and contingent guardianship provisions for underage children	\$650	\$1,100 (Includes 2 Wills)
Complex Last Will & Testament – Same as Simple Last Will & Testament (above), but also includes Tribal Trust Land Planning, Special Needs Trust, or multiple Testamentary Trusts for Minors	\$800	\$1,400 (Includes 2 Wills)
Complex Last Wills & Testament for Married Couple with assets over \$3 million – Same as Simple or Intermediate Last Will & Testament (above), but also includes Elective Spousal Trust for estate tax planning for marital estates valued over \$3 million	N/A	\$2,250 (Includes 2 Wills)
Durable Power of Attorney for Finances – Document allows you to choose a trusted individual to act on your behalf to handle financial affairs in the event of your disability (or immediately when signed)	\$175	\$275 (includes 2 DPOAs)
Durable Power of Attorney for Healthcare – Document allows you to choose a trusted individual to act on your behalf to make medical decisions in the event of your disability (or immediately when signed)	\$175	\$275 (includes 2 DPOAs)
Advanced Health Care Directive a/k/a “Living Will” – Document allows you to choose how you wish to be treated in terminal or “permanently unconscious” situation, including whether to remove intubation, feeding tubes, medicine for pain management, etc.	\$175	\$275 (includes 2 HCDs)
Transfer on Death Deed– Document allows you to complete a deed that automatically with county where real estate is located *Rate DOES NOT include \$350 in associated filing fees and costs (billed extra)	\$500*	\$500*
Quit Claim Deed – Document executed and filed with county where real estate is located along with REETA tax form *Rate DOES NOT include \$350 in associated filing fees and costs (billed extra)	\$600*	\$600*
Community Property Agreement – Contractual agreement between married spouses that automatically passes marital property owned jointly or individually to surviving spouse outside of probate	N/A	\$250
Disposition of Remains – Document that includes any specifications about your funeral or burial, including whether or not prearrangements have been completed	\$100	\$150 (includes 2 DORs)



Other Notes

1. **Any no call/no show appointments with less than 24 hours notice will be required to pay a \$250 no show fee in order to reschedule their missed intake or signing appointment.**
2. Any other agreed legal services will be billed at an hourly rate of \$400 (agreed in writing by the Client(s) in advance).
3. Any agreed travel outside of provider area (over 4 miles from office location for individual documents or 10 miles for estate planning packages) will be charged \$200 travel fee + current Federal mileage rate.
4. Any EMERGENCY documents will only be completed as accepted case-by-case by Attorney. There will be an additional \$400 hourly rate “emergency fee” for any documents requiring completion in less than 5 business days and/or requiring signing in a hospital or assisted living/rehabilitation facility.
5. A majority of estate planning documents require two disinterested witnesses (i.e. individuals who are not named in the documents or related to the signer in any way via blood or marriage). Law Offices of Kate Jones has independent contractors that will serve as witnesses when needed and scheduled in advance. There is an additional \$60 fee for each witness needed for all signings. This amount is paid directly to the witness and not retained by the Law Offices of Kate Jones. Alternatively, Client(s) can arrange for their own disinterested witnesses to be present for the signing for no additional fee.
6. Payments to Law Offices of Kate Jones can be made via Square payment (invoice or card swipe), Paypal, Venmo, or personal check.