

**VERSTEGEN & FOBE**  
**2017 FEE SCHEDULE**  
**ESTATE PLANNING PACKAGES**

***WILL PACKAGE FOR SINGLE INDIVIDUAL*** **\$1,500**

Estate Plan Summary, Last Will and Testament (with guardian nominations for minor children), General Durable Power of Attorney (including Statutory Financial Power of Attorney), Advance Medical Directives (Nomination of Health Care Agents, Living Will, Guardianship avoidance, Medical Records Release).

***WILL PACKAGE FOR COUPLES*** **\$3,000**

Estate Plan Summary, Last Will and Testament (with guardian nominations for minor children), General Durable Power of Attorney (including Statutory Financial Power of Attorney), Advance Medical Directives (Nomination of Health Care Agents, Living Will, Guardianship avoidance, Medical Records Release).

***TRUST PACKAGE FOR SINGLE INDIVIDUAL*** **\$2,000**

Estate Plan Summary, Trust Abstract/Certification, Individual Revocable Trust, Pour-Over Will (with guardian nominations for minor children), General Durable Power of Attorney (including Statutory Financial Power of Attorney), Advance Medical Directives (Nomination of Health Care Agents, Living Will, Guardianship avoidance, Medical Records Release), Asset transfer forms/instructions (up to 10) *excluding* deeds.

***JOINT TRUST PACKAGE FOR COUPLES*** **\$3,500**

Estate Plan Summary, Trust Abstract/Certification, Joint Revocable Family Trust, Two Pour-Over Wills (with guardian nominations for minor children), Two General Durable Powers of Attorney (including Statutory Financial Powers of Attorney), Two sets of Advance Medical Directives (Nomination of Health Care Agents, Living Wills, Guardianship avoidance, Medical Records Release), Asset transfer forms/instructions (up to 15) *excluding* deeds.

***SEPARATE TRUST PACKAGE FOR COUPLES*** **\$4,000**

Estate Plan Summary, Trust Abstract/Certification, Two Separate Revocable Trusts (with optional bypass, marital, QDOT Provisions), Two Pour-Over Will (with guardian nominations for minor children), Two General Durable Powers of Attorney (including Statutory Financial Powers of Attorney), Two sets of Advance Medical Directives (Nomination of Health Care Agents, Living Will, Guardianship avoidance, Medical Records Release), Asset transfer forms/instructions (up to 20) *excluding* deeds.

## MISCELLANEOUS FEES AND FIRM BILLING POLICIES

- Non-refundable Initial Consultation Fee (45 minutes) \$250<sup>1</sup>
  - Deed preparation (excluding recordation fees) \$300 per deed
  - Deed retrieval \$25 per deed
  - Post signing communications (minimum 15 minutes) \$350 per hour
  - Additional review meeting (up to 1 hour) \$350
  - File reactivation after 60 days (includes 1 hour meeting) \$350
  - Mortgage opinion letters \$200
  - Certificat de Coutume \$200
  - Estate and Trust Administration \$350/\$125 per hour
  - Storage retrieval fee \$50
  - Storage retrieval fee + copying + mailing \$100
  - Prior/Same-day cancellation penalty + prepay next meeting \$100
  - Signing cancellation with less than 3 days notice \$350
  - Flash Drive with signed documents \$100
  - Five-year Storage fee of duplicate original documents \$100
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- Valid credit card number must be on file during the course of representation. Clients will always have the choice of which payment method to use and will be notified if credit card is being charged.
  - VISA/MASTERCARD/DISCOVER payments (***other than initial consultation***) are subject to **5% surcharge**. Clients paying by credit card expressly waive the right to use the credit card's charge back process and expressly agree that funds will be deposited in the firm's operating account.
  - The final installment is due at the earlier of 1) the signing or 2) 30 days after sending final drafts. If signing occurs after 30 days of sending drafts, the balance will be reduced by \$350 covering the meeting for the signing and any deed recordation charges.
  - Final installment payment minus \$350 covering the meeting for the signing and any deed recordation charges will be payable within 10 days of termination of attorney-client relationship prior to signing.
  - Client Referral Policy: Clients referring other clients will be entitled to a complementary flash drive with scan of all estate planning documents or 5-years of free storage of duplicate documents.
  - All fees (including initial consultation) are **non-refundable** and represent payments of services performed or time spent and are payable at the end of all meetings.
  - Advance payment, including penalty, is required to reschedule meetings due to no-shows or last minute cancellations.
  - **Flat fees cover:** Four **one-hour** meetings (the initial consultation, intake, review, signing); estate planning documents, asset transfer documents **other than** deeds, motor vehicle registrations, businesses entities transfers; witnessing; notarization; safekeeping of duplicate originals until end of calendar year; postage in United States, minor revisions, minor corrections and edits, emails and phone calls.
  - **Hourly Attorney Rate:** \$350 per hour applies to meetings exceeding one hour; requests for excessive revisions and requests for research and lengthy written explanations, client communications after the signing; communications with accountants, financial advisers, client family members.
  - **Hourly Paralegal Rate:** \$100 per hour for post signing requests.

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<sup>1</sup> Will be credited towards the drafting of estate planning documents provided intake meeting takes place within three months of initial consultation.