

**Trusts, Wills, Estate Administration & Litigation Rates**

Trust estate plans include the following:

- Revocable Living Trust
- Pour-Over-Will\*
- Durable Power of Attorney for property\*
- Durable Power of Attorney for health care\*
- Deed prepared and recorded that transfers California residence to trust
- Instructions for transfer to the Trust of:
  - Bank accounts
  - Stock and other investment accounts
  - Life Insurance

Estate Plan Book for maintaining organized records

- ◆◆ For a single person: **\$1,750**
- ◆◆ For a married couple: **\$2,250 \*One each for a husband and wife**

The quoted fee is for a basic probate avoidance trust. Additional unusual provisions may require a higher fee based on research and drafting time. There is a \$1,000 additional fee for expedited documents (in one week), \$1,000 paid in advance.

**TRANSFERS or RECORDINGS of DEEDS or RELATED DOCUMENTS:**

- Real property located in California: **\$500 per transfer**
- Affidavit of death of joint tenant or trustee: **\$800 each**
- Real property located outside of California: **\$800 or more**
- Stocks and Investment accounts: **\$200 per transfer** (usually easily done by the client)

**WILLS: \$500 each.** (more if complex provisions or numerous specific gifts and conditions)

**CONSERVATORSHIPS, TRUST ADMINISTRATION AND OTHER MATTERS:**

**\$300 to \$450 per hour - retainer fee required.**

**PROBATES: Percentage set by law based on gross estate. Closing petition usually filed within one year of the date the first petition is filed.**

<b>From this:</b>	<b>To:</b>	<b>Fee amount:</b>
\$ 00	\$ 100,000	4% of gross estate
100,000	200,000	\$ 4,000 + 3% of amount over \$100,000
200,000	1,000,000	\$ 7,000 + 2% of amount over \$200,000
1,000,000	10,000,000	\$ 27,000 + 1% of amount over \$1 million
10,000,000	25,000,000	\$117,000 + .5% of amount over \$10 million
\$ 25,000,000	unlimited	\$192,000 + amount approved by court