

# PRICING SCHEDULE

An Estate Plan is an **investment** that will benefit you and your loved ones for years to come. At Shaila Buckley Law, we prepare **customized plans** that address your unique needs and situation, both personal and financial. Our flat fees are based on the **complexity** involved in drafting your customized plan.

## FLAT FEE PRICING - REVOCABLE TRUST PLANS

Our flat fee Revocable Trust plans include the following documents: (1) Revocable Trust; (2) Certification of Trust; (3) Pour Over Will; (4) Guardian nomination (if applicable); (5) Power(s) of Attorney for Finance; (6) Power(s) of Attorney for Health; (7) End-of-Life Care Wishes; (8) HIPAA Authorization; (9) Final Disposition Instructions; (10) Instructions for Disposition of Personal Property; (11) Assignment of Personal Property to Trust; (12) Transfer of Personal Residence into Trust; (13) Update to Homeowner's Exemption; (14) Assignment of Business Interests to Trust (if applicable); (15) Summary of Trust Provisions; (16) Asset Inventory; and (17) customized To Do List for Trust Funding.

<b>Simple Revocable Living Trust Plan</b>	This is for clients with simple distribution provisions who do not need tax planning.	<b>\$5,000</b>
<b>Complex Revocable Living Trust Plan</b>	This is for clients with complex distribution provisions who do not need tax planning. The flat fee will fall within this range based on the complexity of the distribution provisions.	<b>\$6,000 - \$7,000</b>
<b>Revocable Living Trust with Simple Tax Planning</b>	This is for clients who need simple tax planning. For married couples, this plan involves the creation of an irrevocable trust on the death of the first spouse, sometimes referred to as an "A-B Trust."	<b>\$7,000</b>
<b>Revocable Living Trust with Asset Preservation on First Death</b>	This is for married couples who want to preserve the assets and protect the beneficiaries of the first spouse to die. This plan involves the creation of an irrevocable trust on the death of the first spouse and is a good option for blended families.	<b>\$7,000</b>

**Complex Taxable Estate Planning:** For individuals with more than \$8,000,000 in assets and couples with more than \$16,000,000 in assets who need complex tax planning, please contact our office for pricing information.

## FLAT FEE PRICING - WILL PLANS

We specialize in preparing Revocable Trusts and find they are the best choice for most of our clients. If you prefer a Will, our flat fee Will plans include the following: (1) Will(s); (2) Guardian nomination (if applicable); (3) Power(s) of Attorney for Finance; (4) Power(s) of Attorney for Health; (5) End-of-Life Care Wishes; (6) HIPAA Authorization; (7) Final Disposition Instructions; (8) Instructions for Disposition of Personal Property; and (9) Asset Inventory.

<b>Simple Will Plan</b>	This is for clients with simple distribution provisions,	<b>\$3,000</b>
<b>Complex Will Plan</b>	This is for clients with complex distribution provisions.	<b>\$5,000</b>

## FLAT FEE PRICING – STAND-ALONE TRUSTS

Some clients want to include additional stand-alone Trusts as part of their larger estate plan. The flat fee for the stand-alone Trusts are *in addition to* the flat fees listed above. Please contact our office for pricing information if you are interested in having us prepare a stand-alone Trust that is not part of preparing your larger estate plan.

<b>Inheritance Trusts for Loved Ones</b>	These Trusts are for clients who want to leave their beneficiaries' inheritances to them in separate trusts to protect the inheritance from creditors, bankruptcy, and divorce, and, if applicable, shield the inheritance from additional estate taxes when that beneficiary dies. This flat fee includes the preparation of up to four standard Asset Protection Trusts for children or loved ones.	<b>\$1,000</b>
<b>Vacation Home Trust</b>	This Trust is for clients who have a vacation home, such as a cabin in McCall, that they want to pass to multiple beneficiaries for shared use.	<b>\$1,000</b>
<b>Separate Property Trust for One Spouse</b>	This Trust is for clients who receive an inheritance or gift and want to hold those assets in a separate trust to ensure that the assets retain their separate property status in the event of a divorce and pass to their children or other chosen beneficiaries when they die.	<b>\$1,000</b>
<b>IRA Beneficiary Trust</b>	This Trust is for blended families in which a sizable portion of one or both spouse's assets are in tax-deferred retirement accounts. Placing these assets into an IRA Beneficiary Trust ensures that these assets are available for the Surviving Spouse during his or her lifetime, but that on the death of the Surviving Spouse, the retirement benefits pass to the beneficiaries of the First Spouse.	<b>\$1,000</b>
<b>Legacy Trust</b>	This Trust is for clients with significant assets who want to leave their assets in trust for the benefit of multiple generations or beneficiaries, and who want to ensure these assets are shielded from future estate taxes. Some clients designate a specific purpose for these trusts, such as for education expenses.	<b>\$3,000</b>
<b>Irrevocable Life Insurance Trust</b>	This Trust is for clients with a taxable or potentially taxable estate (individuals with more than \$8,000,000 in assets or couples with more than \$16,000,000) who want to provide a source of funds for payment of estate taxes.	<b>\$5,000</b>

## FLAT FEE PRICING – LIMITED LIABILITY COMPANY FORMATION

### LLC Formation

For clients who need to form an LLC, we will prepare the following: Operating Agreement, obtain Tax ID Number (EIN), and provide you with resources on how to register the LLC with the Idaho Secretary of State and comply with the "Corporate Transparency Act"

\$500

### ADDITIONAL SERVICES

**Additional Meetings:** Our flat fee plans include two meetings, the Initial Consultation and the Signing Meeting. From time to time, some clients with more complex estates request an additional meeting. We charge \$400 for each additional meeting.

**Transfer of Additional Idaho Real Estate Into Trust:** Our flat fee includes the transfer of a personal residence and one additional piece of Idaho real estate into your Trust. For clients with more than two pieces of real property in Idaho, we charge \$200 per additional transfer.

**Coordination of Out-of-State Property Transfer:** Clients who own real property in states outside of Idaho need to hire an out-of-state attorney to transfer these properties into your Trust. We charge \$500 per state to assist clients with locating an out-of-state attorney and coordinating the transfer process. The client is responsible for all fees charged by the out-of-state attorney.

**Simple Amendments to Estate Plan for Existing Clients:** We encourage our clients to review their estate plans every few years to make sure it reflects their current wishes and that it addresses any significant life changes that may occur. For simple amendments to existing estate plans, we charge by the hour. Our current hourly rate is \$400/hr.

**Other Hourly work:** From time to time, clients need legal advice related to matters outside the scope of the flat fee. Provided the matter is within our area of expertise, we charge by the hour for this type of work. Our current hourly rate is \$400/hr. If the matter is not within our area of expertise, we are happy to refer you to an attorney who can assist you.