

# WELCOME PACKET

Everything you need to know about  
working with Shaila Buckley Law







[www.shailabuckleylaw.com](http://www.shailabuckleylaw.com)



# INTRODUCTION

Hello!

Thank you for scheduling an Estate Plan Initial Consultation with Shaila Buckley Law. In this packet, you'll find important information for our meeting, including:

-  A description of the estate planning process
-  What we'll need from you to prepare your estate plan
-  What you'll receive from us as part of your estate plan
-  Information about our approach to estate planning
-  Directions to our office
-  Our current pricing schedule

If you have questions, please don't hesitate to contact us by phone at [\(208\) 995-9224](tel:2089959224) or email [shaila@shailabuckley.com](mailto:shaila@shailabuckley.com) or [rachel@shailabuckley.com](mailto:rachel@shailabuckley.com).

We look forward to working together to design an estate plan that is right for you and your loved ones.

*Shaila & Rachel*

# THE PROCESS

## The Steps to Create Your Estate Plan

### 1. Estate Plan Questionnaire

Before we meet, we'll ask you to fill out and return an Estate Plan Questionnaire with information about you and your family, your assets, and your estate planning goals. We carefully review your Questionnaire before our Initial Consultation so we understand your needs and can offer substantive advice at our meeting.

### 3. Document Preparation

We'll prepare your estate plan based on our conversation at the Initial Consultation. We'll be in touch if we have questions for you.

### 5. Signing Meeting

At this meeting, we'll walk you through each of your estate plan documents to make sure you understand how they work. You will then sign your documents and make your plan official.

### 2. Initial Consultation

During our Initial Consultation, we'll describe the basics of the estate planning process and discuss your goals for your estate plan. After listening carefully to your needs and wishes, we'll offer our recommendation on the best plan to meet your needs, and discuss pricing. If you're ready to move forward, we'll schedule your Signing Meeting so that both of us have a deadline to complete your plan.

### 4. Review of Drafts

Once we complete your documents, we'll email drafts of the key documents for you to review. We'll address any questions you have and make changes or revisions, if needed.



# WHAT WE NEED FROM YOU

## To Prepare Your Estate Plan



### Information About You, Your Family, and Your Goals

In order to design an estate plan that meets your goals and protects your loved ones, we need information about you, your family, and your assets. You will provide this information by completing the [Estate Plan Questionnaire](#) prior to our meeting. The Questionnaire helps us understand your circumstances and priorities. It also provides us with the information we need to determine the best estate plan for you. Please [click here](#) to download the Questionnaire.



### A List of Your Assets

One of the most overlooked parts of the estate planning process is making sure your loved ones can locate all of your assets after you pass. Without a detailed list of your accounts, your beneficiaries may not be able to locate the assets you spent a lifetime accruing. The [Asset Inventory](#), included with this packet, provides a detailed road map for your loved ones to locate your assets. We will include the Asset Inventory in your Estate Plan Portfolio. Please [click here](#) to download the Asset Inventory.



### Communication

[This is your Estate Plan](#). It's important that it accomplishes your goals, and that you understand how it works. These documents can be complicated. Rest assured that we take the time to listen to you, timely respond to your emails, and ensure that all of your questions are answered.



# WHAT YOU'LL RECEIVE FROM US

## As Part of Your Customized Estate Plan

1

### **Revocable Living Trust and/or Will**

Setting forth who gets your assets after you pass and, importantly, how and when your loved ones get your assets. We encourage our clients with young children to stagger the distributions your children receive so they have a chance to practice managing money while the bulk of their inheritance is kept safe by a trusted adult chosen by you.

2

### **Nomination of Guardian**

Designating who you want to care for your minor children if something were to happen to you.

3

### **Power of Attorney for Finances**

Designating someone you trust to manage your finances if you become incapacitated.

4

### **Power of Attorney for Health**

Designating someone who is level headed, able to understand complex medical information, and will advocate for you if you cannot communicate your wishes.

5

### **Living Will**

Setting forth your end of life wishes so that your doctors and your loved ones know what type of care you want.

6

### **Asset Inventory**

Detailed inventory providing a list of your assets to ensure that your loved ones can find all of your assets and nothing gets overlooked.

# OUR PHILOSOPHY

## What to Expect When You Work with Us

**Our goal is to make your estate planning process as easy as possible.**

We understand that estate planning can be daunting. That's why **we deliberately run our practice differently than a typical law firm**: we prioritize taking the time to listen to our clients and understand their needs. We also take the time to make sure everyone who receives an estate plan from our office understands their plan, how it works, and how to keep it current as they encounter life's changes.



**Rachel Murphy (Of Counsel)**  
B.A. Williams College  
J.D. Stanford Law School



**Shaila Buckley (Founder)**  
B.A. Willamette University  
J.D. Stanford Law School

Estate planning is something everyone should do. However, in our experience, “Set up Estate Plan” often gets stuck on our mental “to do” list – it’s something we know is important, but it’s hard to get to with so many other demands on our time and attention.

**We are here to help you check this critical item off your list.**

Estate planning is a gift to the people you love. We will help you put together the best plan for you and your loved ones.



# DIRECTIONS TO SHAILA BUCKLEY LAW

Located in Downtown Boise

Our office is located in the Wells Fargo Building in downtown Boise at:

877 W. Main Street  
6th Floor  
Suite 610  
t. 208-995-9224

## DIRECTIONS

### From 184:

Continue on 184 towards downtown until the highway turns into Myrtle St.  
Turn left on 11th St.  
Turn right on Main St.  
Turn right on 9th St.  
Enter the Parking Garage for the Wells Fargo Building, on the left side on 9th Street.

### From Front St.:

Turn right on Capitol Blvd.  
Turn left on Idaho St.  
Turn left on 9th St.  
Enter the Parking Garage for the Wells Fargo Building, on the left side on 9th Street.

## PARKING

Parking is available in the Wells Fargo Building's parking garage, located on 9th St. between Main and Front St. The first hour of parking is free. There is also metered street parking available, as well as other downtown parking garages.



# 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; (5) Power(s) of Attorney for Health; (4) End-of-Life Care Wishes; (5) HIPAA Authorization; (6) Final Disposition Instructions; (7) Instructions for Disposition of Personal Property; and (8) 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>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

<b>LLC Formation</b>	For clients who need to form an LLC, we will prepare the following: Operating Agreement, Registration of LLC with Secretary of State, obtain Tax ID Number (EIN), transfer of real property into LLC (if applicable)	<b>\$1,500</b>
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## 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.