

Lauren Richardson Law, PLLC
Estate Planning Packages - Pricing Menu

All Estate Planning Packages include the following: free 15 minute phone consultation to gather background and offer a quote. Once retained, there is a follow-up phone or in-person consultation to gather details to customize your plan. Next steps include document preparation; document review; document signing appointment, or if remote, original documents prepared for your signature with detailed signing instructions; packet for you to take home with originals and extra copies for your use; and attorney instruction letter. Plans with a trust include instructions for and help with trust funding as needed.

Estate Planning Packages for larger or more complex estates may also include the following: potential client completes our firm's estate planning questionnaire followed by initial family legacy planning consultation either by phone, Zoom, or in person to discuss assets, wishes, goals, and fee estimates for each option. See below for description and fee for family legacy planning consultation, which is deducted from total fee for option selected if retained.

Basic Will Package

Last Will and Testament
Durable Power of Attorney
Designation of Health Care Surrogate
Living Will
Single person: \$800
Couple: \$1,200

Will With Trust for Minors Package

Last Will and Testament w/Trust for Minors
Durable Power of Attorney
Designation of Health Care Surrogate
Living Will
Single person: \$1,000
Couple: \$1,400

Will With Supplemental Needs Trust for Disabled Beneficiary Package

Last Will and Testament w/Suppl. Needs Trust
Durable Power of Attorney
Designation of Health Care Surrogate
Living Will
Single person: \$1,500
Couple: \$2,000

Basic Revocable Living Trust Package

Revocable Living Trust Agreement
"Pourover" Will
Durable Power of Attorney
Designation of Health Care Surrogate
Living Will
Single Grantor: \$2,500
Couple with Joint Trust: \$3,000

Durable Power of Attorney Package

Durable Power of Attorney
Designation of Health Care Surrogate
Living Will
Single person: \$600
Couple: \$800

Durable Power of Attorney w/ Health Care Powers (single document)

Single person: \$300
Couple: \$450

Additional Documents:

Enhanced Life Estate Deed* ("ladybird"): \$400
Deed Into Trust* (for trust funding): \$400
Deed of Gift* (quitclaim deed): \$400
Suppl. Needs Trust/Disability Trust: \$1,800
*includes recording fees
Personal Services Contract \$1,000

Family Legacy Planning Consultation \$900

Initial Consultation includes attorney review of estate planning questionnaire and presentation of a range of options and fees for such options for potential clients to choose from based on goals of probate avoidance; estate, gift and income tax minimization; business succession planning; and family dynamics. If client retains after consultation, the fee for consultation will be deducted from fee for option selected.

Fee estimates are provided for more complex estate plans based on information from the in-depth estate planning questionnaire and Family Legacy Planning Consultation and hourly rate of \$450:

More Complex Estate Plans include Joint or Individual Revocable Living Trusts with Estate Tax Planning Provisions, Revocable Living Trusts with Supplemental Needs Subtrust for Disabled Beneficiary, Other Customized Revocable Trusts, Irrevocable Trusts, Charitable Trusts, Business Succession Planning, and Complex Generational Planning.