

## Summary of Estate Planning Approximate Costs and 2022 Rates

<b>Estate Planning</b>	<b>Approximate Cost</b>
Streamlined EP Individual (Ancillaries)	\$4,000 fixed fee
Streamlined EP Couple (Ancillaries)	\$6,000 fixed fee
<b>Standard EP Individual (Ancillaries)</b>	<b>\$5,500 - \$12,000+</b>
<b>Standard EP Couple (Ancillaries)</b>	<b>\$7,000 - \$15,000+</b>
Revocable Trust for Individual (Ancillaries) (Includes Pourover Will, Revocable Trust, Assignment of Tangible Personal Property and Instructions to Fund Memo)	\$7,000 - \$15,000+
Revocable Trust for Couple (Ancillaries) (Includes Pourover Will, Revocable Trust, Assignment of Tangible Personal Property and Instructions to Fund Memo)	\$8,000 - \$15,000+
Life Insurance Trust	\$4,500 - \$7,500+
Single Person Irrevocable Trust (e.g. child or grandchild)	\$4,500 - \$7,500+
Qualified Personal Residence Trust/Spousal Lifetime Access Trust	\$6,500 - \$8,000+
Customized Beneficiary Forms to Link Retirement assets to Trusts	\$1,800+

**The majority of clients fall in the middle of the ranges**

### Ancillary Documents include:

1. Living Will
2. Health Care Proxy
3. HIPAA Form
4. Power of Attorney
5. Organ Donor Declaration
6. Digital Asset Authorization

### **Hourly rates as of January 1, 2022:**

- Principal (Jill Miller) \$725
- Of Counsel \$650
- Associate \$490
- Paralegal \$375
- Law Clerk \$200