

Living Trust Fee Schedule

For estates having a net value of less than **\$5,000,000** and not subject to death tax:

- ***Single person, starts at \$699.00***
- ***Husband and Wife, starts at \$899.00***

Service Includes:

- ***Living Trust and Schedule A***
- ***Durable Power of Attorney for Financial Management***
- ***Will, leaving estate to trust***
- ***Preparation of deed to transfer a California residence to the trust estate and arranging for its recording with the County***
- ***Assistance with the transfer of other assets to the trust estate***

A CLIENT MAY ARRANGE FOR THE TRANSFER OF OTHER ASSETS TO THE TRUST WITH THE HELP OF THE ATTORNEY AT NO ADDITIONAL COST: At no charge, we prepare a letter of instruction for the re-title of an asset that you may send to the financial institution.

WHEN WE TRANSFER THE ASSETS: You will be asked to provide your most recent papers related to your assets. We transfer the assets to the trust based on the information that you give us. If you have lost or misplaced your papers, or if your papers are not legally sufficient, we can help get replacement papers or put things in order at Ms. Callahan's hourly rate.

IF YOUR TRUST IS COMPLICATED: The basic fees quoted are for a living trust that does not contain any complicated distributions after your death or otherwise. If you desire special provisions that are unusual or complicated, then your trust will cost the basic rate plus charges for making special provisions. The service for writing special provisions is charged to you at Ms. Callahan's hourly rate. Most persons who own one real property and give their trust estate to their mutual children equally and unconditionally pay only the basic fees.

OTHER HELPFUL INFORMATION: All appointments are with Ms. Callahan, not an assistant. Drafts of most trusts for small estates are mailed to you within about 10 business days of your initial visit. Notary fees and fees paid to the County Recorder are extra.

MODIFICATIONS AND INQUIRIES: The fees for trust preparation include the initial visit and a signing appointment. A draft of the trust and other documents are mailed to you before the signing appointment is scheduled. Requested modifications of the draft are made at the hourly rate.