

ESTATE PLANNING FEE SCHEDULE

[These fees are effective as of January 1, 2022 and are subject to change at any time without notice]

The following is a list of the most common estate planning documents we prepare. There are a number of documents included in the "Will Package" and in the "Trust Packages." Rather than list the price for each item in a package individually, which may be misleading, we list them in groups because all documents are needed to create an estate plan.

Payment of fees is required before we begin drafting your documents. *If you have a question about our fees, please feel free to discuss them with us at the time of your initial consultation.*

** The preparation of a deed to transfer one California property from you into your trust is included in the package price shown below. If your property is not currently in your name, there will be additional charges for the necessary work to transfer the property into your name first and then into your trust. If you own more than one property in California, there are additional charges to transfer those additional properties into your trust. The County Recorder's charges to record any documents will be advanced by us and billed to you. County Recorder's charges are **NOT** included in the fees listed below. The County Recorder's charge to transfer your personal residence into you trust is generally less than \$100. The County Recorder's charge to transfer a property other than your personal residence is generally \$110 - \$220 per property. Properties located outside of the State of California should be transferred by an attorney licensed to practice law in the state where the property is located.*

1. Estate Planning Consultation for New Clients with NO Existing Estate Plan **NO CHARGE**

2. Estate Planning Consultation for New Clients with an Existing Trust

*[This includes attorney review of your existing estate planning documents and a consultation with an attorney to discuss current estate plan recommendations and changes you are considering. We must receive a **COPY** of your existing estate planning documents (**not the originals, but a copy we can keep**) together with payment of this fee at least two weeks before your appointment date to allow sufficient time for an attorney to review your documents and prepare thoroughly for your appointment. This amount is nonrefundable once an attorney reviews your documents. Half of the amount paid (i.e., \$250) will be credited toward additional estate planning services provided. Any change to an estate plan not prepared by The Law Office of John T. Anderson requires a "Trust Package" listed below.]*

Minimum \$500

3. Will Package

Will, Power of Attorney for Health Care/Advance Health Care Directive, Power of Attorney for Asset Management

**Individual \$350
Couple \$500**

4. "Standard" Trust Package

[Usually appropriate for a single person or for a married couple who own real property and with assets totaling approximately \$5 million or less]

- Standard Trust
- Will(s)
- Certification of Trust
- Community Property Declaration (if needed)
- Bill of Sale for Personal Property
- Power of Attorney(s) for Health Care/Advance Health Care Directive(s)
- Power of Attorney(s) for Asset Management
- Deed(s) to transfer one property from your name into your trust*

**Individual \$1,950
Couple \$2,500**

5. “A & B” Trust Package (including A/B “Disclaimer” Trust)

[Usually appropriate for a married couple with assets in excess of \$5 million or with complex family situations]

- “A/B” Trust or A/B “Disclaimer” Trust
- Wills
- Certification of Trust
- Community Property Declaration
- Bill of Sale for Personal Property
- Power of Attorneys for Health Care/Advance Health Care Directives
- Power of Attorneys for Asset Management
- Deed to transfer one property from your name into your trust* **\$3,000**

6. “Q-TIP” Trust Package (A/B/C Trust)

[Usually appropriate for a married couple with assets over \$10 million]

- “Q-TIP” Trust
- Wills
- Certification of Trust
- Community Property Declaration
- Bill of Sale for Personal Property
- Power of Attorneys for Health Care/Advance Health Care Directives
- Power of Attorneys for Asset Management
- Deed(s) to transfer one property from your name into your trust* **\$4,000**

7. S-Corporation Provisions Added to Trust Additional \$500

8. Special Needs Trust Provisions Added to Trust Additional \$500

9. Amendment to Trust Prepared by John Anderson Minimum \$500
[includes codicil to will, and new powers of attorney, if needed]

10. Complete Restatement of Existing Trust Prepared by John Anderson
[includes new will (or codicil to will), and new powers of attorney, if needed]

Restatement to:

<i>Standard Trust [Individual/Couple]</i>	Minimum \$1,000/\$1,500
<i>A & B Trust including A/B Disclaimer Trust</i>	Minimum \$2,000
<i>A/B/C Trust</i>	Minimum \$3,000

15. Power of Attorney for Asset Management \$150

16. Power of Attorney for Health Care/Advance Health Care Directive \$150

17. Additional Services:

John T. Anderson \$550/hr. | Lisa R. Norman \$350/hr.
John T. Anderson, Jr. \$250/hr. | Paralegals and Legal Assistants \$150/hr.
Minimum Time Billed is 0.01 Hours (6 minutes)

We Look Forward to Serving You!

AFTER-DEATH ADMINISTRATION FEE SCHEDULE

[These fees are effective as of January 1, 2022 and are subject to change at any time without notice]

The following is a list of common charges associated with post-death administration. Most fees related to the administration of a trust are charged at the individual attorney's or staff member's usual hourly rate (as provided below) or are based off of one percent of the gross value of the decedent's estate. For probates, attorneys' fees are based upon the rates outlined in the California Probate Code (see below).

These fees are merely an estimate and are subject to change at any time and without notice. We strive to be transparent and upfront about our fees. For a more detailed explanation of our fees, please see your specific client retainer agreement. If you have questions about our fees, please contact our office.

Initial Trust Administration Appointment

Appointment with attorney for the Successor Trustee after a person with a trust has passed away. The appointment includes attorney review of decedent's estate plan and a consultation with an attorney.

Trust Prepared by John T. Anderson	\$250
Trust Not Prepared by John T. Anderson	\$500

Trust Administration Retainer Amount

\$1,500

If, after the initial consultation, you decide to retain our office, the above-mentioned, nonrefundable retainer amount is due, together with our signed retainer agreement, before we begin preparing any documents or performing any further tasks. Fees for our trust administration services are based upon our hourly fee rates (see below) or upon one percent of the gross value of the decedent's estate depending on the specific situation and agreement between you and our office.

Estimated Total Trust Administration Fees

\$4,000.00 to \$8,000.00 or one percent of the gross value of the decedent's estate

California Deeds:

***Minimum \$350**

* Plus County Recorder's fees, which will be advanced by us and billed to you.

Affidavit Death of Trustee (or Joint Tenant)

***Minimum \$500**

* Plus County Recorder's fees, which will be advanced by us and billed to you.

Small Estate Affidavit / California 13100 Petition

\$200

Certification of Trust

\$150

Probate Fees

Our fees for probate matters are based on California Probate Code section 10810 as outlined below. Probate fees are based upon the gross value of the decedent's estate and do not include costs such as court costs and court fees. Probate Attorneys' Fees:

4% of the first \$100,000; 3% of the next \$100,000; 2% of the next \$800,000; and 1% of the next \$9,000,000

Hourly Rates

John T. Anderson \$550/hr. | Lisa R. Norman \$350/hr.
John T. Anderson, Jr. \$250/hr. | Paralegals and Legal Assistants \$150/hr.
Minimum Time Billed is 0.1 Hours (6 minutes)