



REZNIK LAW

Business Law • Wills • Property Leasing

2021 Estate Plan Pricing Information

This document is intended to provide general pricing information. Final pricing may vary based on specific needs. Estate planning services are provided as multi-document estate planning packages. Package price reflects a bundled discount. Please contact us for individual document pricing.

Every estate planning package includes the following:

- (1) Virtual estate planning consultation with Attorney, Orly Reznik.
- (2) Document delivery via secure client portal.
- (3) Summary letter explaining estate planning documents.
- (4) Follow up consultation to review document drafts prior to signing (for trust clients)
- (5) Two document revisions before final signing appointment.¹
- (6) Reznik Law estate organizer/digital asset organizer and trustee handbook (if applicable).
- (7) Signing appointment at Reznik Law's Apex office. (These appointments are on Sundays and take place outside to accommodate for social distancing).
- (8) USB drive with entire file and scanned versions of signed documents.
- (9) Post signing checklist of steps to take once documents are signed.

Will Package Pricing

Will Package with Testamentary Trust: \$950 (per couple) \$850 (individual planner)

Package includes: 2 Wills with testamentary minors trust, 2 General Powers of Attorney, 2 Health Care Powers of Attorney, 2 HIPAA Releases.

Who is the package right for? This package is best suited for individuals or couples who have minor children, a traditional asset composition, and want to leave assets in trust for young children for only a short period of time.

Simple Will Package (no testamentary trust): \$875 per couple, \$750 individual planner.

Package includes: 2 Wills, 2 General Powers of Attorney, 2 Health Care Powers of Attorney, 2 HIPAA Releases, 2 Living Wills.

Who is the package right for? This package is best suited for individuals or couples who do not have minor children, have a traditional asset composition, want to leave assets outright to adults without creating a trust, and do not have multiple specific gifts that will be made in the will.

¹ Additional rounds of revisions and edits are \$100 extra.

Complex Will Package: \$1075 couple, \$900 individual planner

Package includes: 2 Complex Wills, 2 General Powers of Attorney, 2 Health Care Powers of Attorney, 2 HIPAA Releases.

Who is the package right for? This package is best suited for individuals or couples who have non-traditional assets², or need to include multiple specific bequests or gifts in their wills.

Trust Package Pricing

Revocable Living Trust Packages starts with the simple probate avoidance trust and may be subject to additional costs if add-on provisions are needed.

Simple Probate Avoidance Revocable Living Trust Package: \$1,800- \$2,000 per couple, \$1,550- \$1,650 individual planner.

Package includes: 2 Pour Over Wills, 2 General Powers of Attorney, 2 Health Care Powers of Attorney, 2 HIPAA Releases, 2 Living Wills, 1 Joint Revocable Living Trust, 1 Certificate of Trust, 1 Assignment of personal property to trust, 1 deed transferring property to trust, 2 disposition of remains forms, 1 memo for distribution of personal property, and memo regarding funding the trust.

Who is the package right for? This package is best suited for individuals or couples who have estates valued at under \$5 million dollars, would like to avoid probate, need to leave assets in trust for longer periods of time, have a blended family, need to make multiple specific distributions, have a complex asset composition or own multiple properties or properties in multiple states.

*additional deeds to transfer additional properties are \$136 each. \$100.00 to draft deed, \$36.00 recording fee.

Add-on Trust Pricing

Disclaimer Trusts, A/B Trusts- additional \$350-\$450

Special needs planning: additional \$600-\$1000 depending on type of documents needed.

Business planning: cost varies depending on needs. Typical needs include:

1. Review of operating agreement and bylaws, update operating agreement and bylaws to provide succession planning provisions, *call for pricing*.
2. Draft stock certificates, membership certificates resolutions authorizing transfer to trust, and special business provisions for trustee, *price range, \$75-\$150 per business, call for pricing*.

² Non-traditional assets include any assets that require additional provisions to be drafted into the will such as live stock, farmland, closely held businesses, and timeshares, etc.