# Estate Planning Representation and Fee Agreement

## Will Plans

| INITIAL | | FEES |
|---|---|---|
| _____ | Will Plan with Outright Gifts to Beneficiaries | **$2,000** |
| _____ | Will Plan with Trusts for Beneficiaries | **$2,500** |
| _____ | Will Plan with Transfer Tax Planning | **$4,000** |

**Your Will Plan Includes:**

1. One Initial Consultation
2. One In-Person Meeting to Review First Drafts
3. One Revision of First Drafts
4. One Signing Ceremony
5. Will
6. Durable Power of Attorney for Property
7. Power of Attorney for Health Care
8. Living Will
9. Estate Plan Portfolio Binder
10. Second Set of Original Documents

## Revocable Living Trust Plans

| INITIAL | | FEES |
|---|---|---|
| _____ | Revocable Living Trust Plan with Outright Gifts to Beneficiaries | **$2,900** |
| _____ | Revocable Living Trust Plan with Trusts for Beneficiaries | **$3,400** |
| _____ | Revocable Living Trust Plan with Transfer Tax Planning | **$5,500** |

**Your Trust Plan Includes:**

1. One Initial Consultation
2. One In-Person Meeting to Review First Drafts
3. One Revision of First Drafts
4. One Signing Ceremony
5. Revocable Living Trust
6. Pour-Over Will
7. Durable Power of Attorney for Property
8. Power of Attorney for Health Care
9. Living Will
10. Bill of Sale
11. Directions for Tangible Personal Property
12. Trust Funding Instructions
13. Sample Trust Fund Letter
14. Deed (1) (non-Chicago) *($300 per additional deed)*
15. Recording of Deed *(county recorder's fee extra)*
16. Second Set of Original Documents

## Asset Protection Plans

Asset protection plans are appropriate for clients who want to structure their estate plan to include asset protection tools. You should know that a standard revocable living trust provides NO asset protection, unlike the comprehensive asset protection plans offered below.

| INITIAL | | FEES |
|---|---|---|
| _____ | Domestic Law Asset Protection Plan | **$14,695** |
| _____ | Foreign Law Asset Protection Plan | **$16,695** |

**Your Asset Protection Plan Includes:**

1. One Initial Consultation
2. One In-Person Meeting to Review First Drafts
3. One Revision of First Drafts
4. One Signing Ceremony
5. Asset Protection Trust
6. Limited Liability Company
7. Revocable Living Trust
8. Pour-Over Will
9. Durable Power of Attorney for Property
10. Power of Attorney for Health Care
11. Living Will
12. Bill of Sale
13. Directions for Tangible Personal Property
14. Trust Funding Instructions
15. Sample Trust Funding Letter
16. Deed (1) (non-Chicago) *($300 per additional deed)*
17. Recording of Deed *(county recorder's fee extra)*
18. Estate Plan Portfolio Binder
19. Second Set of Original Documents

## Additional/Other Services

| INITIAL(S) | DESCRIPTION | FEE |
|---|---|---|
| _____ | _____ | $ _____ |
| _____ | _____ | $ _____ |

## Total Fee

**Total Fee for Services Approved by Client** $ _____

## Terms of Representation

Client must deposit the entire fee before legal services begin. Please make your check payable to **Shamuel PLLC**, or if paying via Zelle to **Shamuel PLLC, (847) 345-3668**. One-half (1/2) of the total fee is considered earned and due upon mailing the first drafts to you. The balance is considered earned and due the earlier of the formal signing meeting or 14 days from mailing the first drafts to you.

You agree that you will not delay (1) reviewing your first drafts, (2) providing Shamuel PLLC necessary information, and/or (3) scheduling a formal signing of your estate planning documents. You agree that Shamuel PLLC's responsibilities under this Agreement shall terminate upon six calendar months from the date of its signing. If you choose to delay (1) reviewing your first drafts, (2) providing Shamuel PLLC necessary information, and/or (3) scheduling a signing meeting, any of which delay the completion of your estate planning beyond six months from the date of this Agreement, a newly signed and dated Agreement will be required, and an additional fee equal to *at least* one-third of the total fee stated above will be due and owing before Shamuel PLLC returns to working on your estate plan. This extra fee is meant to appropriately compensate Shamuel PLLC for the extra time spent on your matter. It is in your best interest to be diligent in working towards the completion of your estate plan. Please do not procrastinate after we start the estate planning process.

## Approval of Fee and Terms of Representation

**The undersigned confirms that he/she understands and agrees to the fee(s) stated above, billing procedure, and terms of representation.**

Client's Signature

Date

Shamuel PLLC

Date