



DOVETAIL®  
ESTATE PLANNING P.C.

## **CURRENT SCHEDULE OF FEES**

Thank you for considering Dovetail Estate Planning P.C. for your estate planning needs. Below please find a schedule of our current fees for estate planning services provided to clients. We are happy to discuss these fees with you in more detail at any time.

Proper estate planning involves more than the preparation of documents. For this reason, the flat fees set out below always include the following complimentary benefits:

- ***Unlimited Phone and Email Support*** to assist you in funding your trust and/or implementing your plan after your initial funding meeting. This support includes instructions that provide all information needed to transfer accounts at your bank, brokerage firm, insurance company or other institutions where assets are located. It also includes additional funding assistance with assets acquired after the completion of your estate plan and *unlimited access* to “your law office” for questions regarding your plan.
- ***Complimentary Family Meeting*** following the implementation of your plan. For those individuals interested in educating the next generation, this meeting can be used to provide comfort and security to potential survivors. The family meeting can be used to answer questions from those individuals named in your documents. The more information your loved ones know about your plan, the more comfortable they will be in carrying out your instructions when called upon.
- ***Complimentary Anniversary Meeting*** to review your estate plan and confirm there are no necessary changes. In this meeting we will review the titling of your assets, and address any further questions regarding your plan or additional trust

## **ATTORNEY FEES FOR ESTATE PLANNING SERVICES:**

1. For counseling and preparation of a Simple Last Will and Testament *without* significant Estate Tax Planning (outright distributions to beneficiaries / no minor beneficiaries named); Assignment of Tangible Personal Property; Durable Power of Attorney for Financial Matters; Medical Directive and Durable Power of Attorney for Health Care Decisions; HIPAA Release Authorization; Deed for Primary Residence, if necessary; assistance with adding TODs to Missouri car titles, if necessary; and Instructions on How to Title Assets; does not avoid Probate Administration\*:

**\$1,095/individual.....\$1,495/couple**

2. For counseling and preparation of a Revocable Trust to avoid assets being subject to a Probate Administration *without* significant Estate Tax Planning; Last Will and Testament (referred to as a Pourover Will) with Guardian provisions, if necessary; Assignment of Tangible Personal Property; Durable Power of Attorney for Financial Matters; Medical Directive and Durable Power of Attorney for Health Care Decisions; HIPAA Release Authorization; Deed for Primary Residence, if necessary; assistance with adding TODs to Missouri car titles, if necessary; Certification of Trust; and Instructions on How to Title Assets\*:

**\$2,595/individual.....\$2,995/couple**

3. For counseling and preparation of a Revocable Trust to avoid assets being subject to a Probate Administration *with* significant Estate Tax planning; Last Will and Testament (referred to as a Pourover Will) with Guardian provisions, if necessary; Assignment of Tangible Personal Property; Durable Power of Attorney for Financial Matters; Medical Directive and Durable Power of Attorney for Health Care Decisions; HIPAA Release Authorization; Deed for Primary Residence, if necessary; assistance with adding TODs to Missouri car titles, if necessary; Certification of Trust; and Instructions on How to Title Assets\*:

**\$4,000/individual.....\$4,500/couple**

4. For counseling and preparation of an Irrevocable Trust for Life Insurance; Revocable Trust to avoid assets being subject to a Probate Administration *with* significant Estate Tax planning; Last Will and Testament (referred to as a Pourover Will) with Guardian provisions, if necessary; Assignment of Tangible Personal Property; Durable Power of Attorney for Financial Matters; Medical Directive and Durable Power of Attorney for Health Care Decisions; HIPAA Release Authorization; Deed for Primary Residence, if necessary; assistance with adding TODs to Missouri car titles, if necessary; Certification of Trust; and Instructions on How to Title Assets

**\$5,000/individual.....\$5,500/couple**

5. For counseling and preparation of additional Trusts (Revocable Trust to hold Inherited Assets, Irrevocable Life Insurance Trust, Irrevocable Gift Trust for Child or Grandchild) and Instructions on How to Title Assets\*:

**\$2,000 per trust**

6. For all other estate planning services (small amendments to current estate planning documents, additional deeds, transfer on death documents, review of business documents and assignments of business interests, etc.)\*:

**\$350 an hour**

## **ATTORNEY FEES FOR PROBATE SERVICES:**

1. Fees for legal services provided in a simple Small Estate Administration in the Probate Court (an estate without real property with a total value of less than \$40,000.00)\*:

**\$2,595**

2. Fees for legal services provided in the administration of a full probate estate are dependent upon the probate assets. For estates with a total value of more than \$40,000.00 but less than \$200,000.00\*:

**\$5,595**

3. Fees for estates over \$200,000.00 will be determined using the Missouri statutory fee schedule, as set out in the Missouri Probate Code as a guideline, attorney fees will typically be determined as follows\*:

**On the first \$ 5,000, 5 percent;**

**On the next 20,000, 4 percent;**

**On the next 75,000, 3 percent;**

**On the next 300,000, 2 3/4 percent;**

**On the next 600,000, 2 1/2 percent;**

**On all over 1,000,000, 2 percent.**

4. Fees for legal services in establishing a Guardianship and/or Conservatorship Estate in the Probate Court (not contested). *All work after establishing estate will be charged by the hour:*

**\$2,995 per individual for establishing estate**

**\$350 an hour after estate established**

### **ATTORNEY FEES FOR NONPROBATE TRUST AND ESTATE ADMINISTRATION SERVICES:**

Fees for legal services in assisting with nonprobate Trust and Estate Administration\*:

**\$350 an hour**

***\* In addition to the attorney fees set out above, all expenses are billed to the client at cost. These include, but are not limited to, recording fees, filing fees, court fees, bond fees, car title application fees and publication fees. All attorney fees are paid at time of engagement unless work is performed on an hourly basis. All fees are subject to change in the future.***