

ESTATE PLANNING FEE SCHEDULE

- ** Fees may change depending on simplicity or complexity of estate plan
- ** generally request half payment up front and the remainder upon signing
- ** charge for expenses (recording TODI) will be added to final statement

Complete Estate Plan which includes Powers of Attorney, Living Will, Pour-Over Will and a Revocable Living Trust:

a.	Individual	\$3,500.00
b.	Couple	\$5,000.00

Living Trust (Revocable) for real property, retirement accounts, bank accounts, etc.

a.	Individual	\$2,500.00
b.	Couple	\$4,000.00

Real Estate Trust for homes, condos and other real property

a.	Individual	\$1,500.00
b.	Couple	\$2,000.00

Wills (Last Will and Testament)

a.	Individual	\$1,000.00
b.	Couple	\$ 750.00

Property Power of Attorney

a.	Individual	\$ 300.00
b.	Couple	\$ 400.00

Healthcare Power of Attorney

a.	Individual	\$ 350.00
b.	Couple	\$ 500.00

Codicil to Will for modifications to an existing or future Will or estate plan prepared by Carlson Dash, LLC

a.	Individual	\$ 750.00
b.	Couple	\$ 800.00

Trust Amendment for review and modifications to an existing estate plan, not completed by Carlson Dash, LLC

a.	Individual	\$ 1,450.00
b.	Couple	\$ 1,550.00

Special Needs Trust (Supplemental Needs Trust) for children with a disability who are or will receive public benefits (i.e. Medicaid)

\$4,000.00

Transfer on Death Instrument allows beneficiaries to be named for your home only

a.	Per Property	\$ 750.00
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