

THE LAW OFFICES OF RICHARD J. HERNDON
455 Sam Barr Drive, Suite 207
P. O. Box 617
Kearney, Missouri 64060

Telephone (816) 628-4900 ♦ (800) 494-2218 ♦ Fax (816) 533-7131
Rick@KCTrustlaw.com
www.KCTrustlaw.com

ESTATE PLANNING FEE SCHEDULE

Estate Planning is more than just document preparation. It is the culmination of a process of determining your goals and objectives, educating you about your options, and counseling you to help you determine the best method of achieving your goals. It is in this process that we can provide you with the greatest value. Rather than charging fees for our documents, the fees we charge are essentially for our expertise, experience, guidance and counsel. Unless we agree otherwise, you will not be billed hourly for consultations (whether in person or by telephone) or for any other work or services performed in designing or implementing your Estate Plan. These services are all included in the quoted fee. Please call us with any questions or concerns you may have. We will meet with you as many times as may be necessary to provide you with the peace of mind you are seeking.

Legal Document and Services for Trust Based Plans:

- Individual or Joint Revocable Living Trust Agreement
- Living Trust Summary
- "Pour-Over" Last Will(s) and Testament(s)
- Durable General Legal and Financial Power(s) of Attorney
- Affidavit of Trust/Trust Certification(s)
- Durable Health Care Power(s) of Attorney
- HIPAA Medical Authorizations
- Missouri Advance Directive(s) ("Living Will(s)")
- Docubank Emergency Document Retrieval membership (one year)
- Personal Property Assignment(s)
- Deed transferring Residence to Living Trust
- Other Real Property Deed(s)
- Bank Account Transfer Instructions
- Investment Account Transfer Instructions
- Retirement Account Beneficiary Designation Instructions
- Life Insurance Beneficiary Designation Instructions
- Other Funding Assistance and documents as necessary
- One Year free membership in our TRUST UPKEEP Program

Deed processing and recording fees are billed separately, and are not included in the fees below. Also not included are fees for attorneys in other states that might be required in order to prepare deeds for out of state properties.

Legal Document and Services for Will Based Plans:

- Last Will(s) and Testament(s)
- Durable General Legal and Financial Power(s) of Attorney
- Durable Health Care Power(s) of Attorney
- HIPAA Medical Authorizations
- Missouri Advance Directive(s) (“Living Will(s)”)
- Docubank Emergency Document Retrieval membership (one year)
- Life Insurance Beneficiary Designation Instructions

Fee Schedule

Individual Revocable Trust Plan including asset protection for beneficiaries	\$1,600
Joint Revocable Trust Plan including asset protection for beneficiaries	\$2,000
IRA Protection Trust (if done at time of any other Plan)	\$1,200
IRA Protection Trust (if no other planning done)	\$1,800
Additional IRA Protection Trust – for spouse	\$800
Adding Extended Asset protection to IRA Protection Trust	\$600
Will Based Estate Plan – Individual	\$600
Will Based Estate Plan – Couple	\$900
Addition of Estate Tax Planning in anticipation of changes in the tax law	\$1,600
Adding Special Needs Trust for Beneficiaries to Living Trust or Will	\$600
Stand Alone “Third Party” Special Needs Trust for disabled Beneficiary	\$1,400
Irrevocable Life Insurance Trust	\$1,400
Power of Attorney and Health Care Documents only – Individual	\$200
Power of Attorney and Health Care Documents only – Couple	\$300
Beneficiary (Transfer on Death) Deed	\$125 plus recording fee
Missouri Corporation – simple	\$750 plus filing fees of \$53 and minute book charge – normally \$75
Limited Liability Company – simple	\$750 plus filing fees of \$50
Missouri Probate Administration	Per Missouri Minimum Fee Schedule – ask us for a copy
Trust Administration	Individually Quoted
Extended Trust Funding Assistance	Individually Quoted

Other more specialized tools and projects, complex business organizations, etc., will be quoted on a per project basis, either alone, or in conjunction with any other planning. Our standard billing rate is \$200 per hour.

We reserve the right to modify any of the above charges, higher or lower, based on the facts and circumstances of your situation.

Prior to commencing work a letter agreement will be prepared and signed in order that you will know precisely what you are paying and what you may expect to receive.

Generally we require a payment of one half of the fees at commencement of work, with the remainder due when you sign documents, or within sixty days, whichever occurs first.

We do not charge for our initial consultation – you do not owe us anything until you decide that you want us to work for you and we reach a full agreement.