

## ESTATE PLANNING RATES FOR 2023

We offer up front, flat rate pricing for our estate planning services, as described below. Please note that our fees may vary in exceptional circumstances. If so, we will work with you to develop a plan that best meets your estate planning goals. Such a plan may include documents not discussed below. After the initial estate plan is completed and signed, any further services rendered are subject to separate fees.

PACKAGE/SERVICE	COST	
<p><b>Estate Planning Consultation</b> Video, phone, or in person meeting (up to one hour) to discuss Client's estate planning goals, identify strategies, gather relevant information, and discuss next steps.</p> <p><i>If Client engages HLG for an Essential Package, Update Package, or Young Adult Package described below, the consultation cost will be applied to the quoted flat fee for services.</i></p>	\$200	
<b>Essential Packages</b>		
<p><b>Living Trust-Based Estate Plan Package</b></p> <ul style="list-style-type: none"> <li>• Revocable living trust with optional credit shelter trust provisions</li> <li>• Will with optional guardianship provisions</li> <li>• Durable power of attorney</li> <li>• Advance directive for health care</li> <li>• HIPAA release</li> <li>• Professional estate plan binder to help you keep your plan safe and organized</li> <li>• Scanned electronic copy of executed estate plan</li> <li>• Up to one deed transferring real estate to trust</li> </ul>	Single \$2,000	Couple \$3,000
<p><b>Will-Based Estate Plan Package</b></p> <ul style="list-style-type: none"> <li>• Will with optional guardianship &amp; support trust provisions</li> <li>• Durable power of attorney</li> <li>• Advance directive for health care</li> <li>• HIPAA release</li> <li>• Professional estate plan binder to help you keep your plan safe and organized</li> <li>• Scanned electronic copy of executed estate plan</li> </ul>	Single \$1,000	Couple \$2,000

PACKAGE/SERVICE	COST	
<b>Asset Alignment Package</b> <ul style="list-style-type: none"> <li>• Preparation of asset inventory spreadsheet</li> <li>• Written recommendations re: titling assets and beneficiary designations.</li> <li>• Six-month review meeting (virtual or in person, up to one hour) to confirm proper alignment</li> </ul>	Single \$750	Couple \$900
<b>Update Packages</b>		
<b>Update Trust-Based Estate Plan</b> If HLG prepared your existing trust-based estate plan, this fee is charged to restate your living trust and update your will(s), power(s) of attorney, HIPAA Releases, and Advance Directive(s).	Single \$1,200	Couple \$1,900
<b>Update Will-Based Estate Plan</b> If HLG prepared your existing will-based estate plan, this fee is charged to update your will(s), power(s) of attorney, HIPAA Releases, and Advance Directive(s).	Single \$600	Couple \$900
<b>Other Services</b>		
<b>Advance Directive + HIPAA Release</b>	\$400	
<b>Amendment to Trust</b>	\$500	
<b>Assignment of LLC Interest or Stock</b>	Ad Hoc \$350	w/ Package \$250
<b>Bank Opinion Letter for Loan or Refinance</b>	\$200	
<b>Conduct Asset Alignment Review Meeting</b>	Single \$300	Couple \$400
<b>Conduct Family Summit</b> Video or in person meeting (up to 90 minutes) with the attorney, client, and client's family/devisees to plan for future efficient trust and estate administration, and to reduce the possibility of interfamily conflict.	\$500	

PACKAGE/SERVICE	COST	
<b>Deed</b> <ul style="list-style-type: none"> <li>• Includes preparation of Transfer Tax Exclusion Affidavit</li> <li>• HLG will obtain property report</li> <li>• Add \$50 if property is outside Oregon</li> <li>• Add \$100 for transfer-on-death provisions</li> <li>• Includes up to \$87 in recording fees paid by HLG</li> </ul>	Ad Hoc \$375	w/ Package \$275
<b>Establish LLC</b> This fee includes preparation and filing of articles of organization, obtaining a tax ID number, preparation of an operating agreement, preparation of initial member resolutions, and a professional tabbed business organization binder.	1 member \$1,000	2+ members \$2,000
<b>Establish Special/Supplemental Needs Trust</b>	\$2,250	
<b>Power of Attorney (Ad Hoc)</b>	\$400	
<b>Real Estate Transaction Package</b> <ul style="list-style-type: none"> <li>• Preparation of Purchase &amp; Sale Agreement</li> <li>• Preparation and recording of deed</li> <li>• Preparation and filing of transfer tax affidavit</li> </ul>	\$1,250	
<b>Young Adult Package</b> <ul style="list-style-type: none"> <li>• Durable power of attorney</li> <li>• Advance directive for health care</li> <li>• HIPAA release</li> </ul>	\$700	