



# Heritage Law Firm Fee Schedule

Pick Your Trust Plan Pricing

## Features

Attorney Meetings & Complimentary Phone Calls (both by appointment only)

Living Trust (Outright Distributions and Identical Distribution Schedule for Both Spouses) See "Upgrades" on Reverse Side for Additional Options and Subtrusts

Certifications of Trust

Assignment of Personal Property

Personal Property Memorandum

Pour Over Will(s)

Durable Financial Power(s) of Attorney

Health Care Power(s) of Attorney

HIPAA Authorization(s)

Advance Directive(s) (Living Will)

Remembrance Memorandum Regarding Final Arrangements

Trust Funding Instructions

Digital Copies of Estate Plan Electronically Stored with Us and Sent to You

Complimentary Consultation with New Trustee Upon Death

Real Estate Transfer Deeds of Conveyance to Your Trust

Credit of Paid Fees Towards Advanced Planning and Asset Protection

**HERITAGE GREEN PLAN**  
\$2,250

**HERITAGE GOLD PLAN**  
(MOST POPULAR)  
\$3,450

**HERITAGE PLATINUM PLAN**  
\$4,950

**1 Meeting; 2 Calls**

**1 Meeting; 5 Calls**

**Unlimited**



**1 Property**

**Up to 3 Properties**

**Up to 5 Properties**



**\$2,000**

**\$3,500**



## Additional Upgrades

### Living Trust Upgrades

Supplemental Needs Trust (also known as Special Needs Trust)	Included
Bloodline Protection (to protect beneficiaries from failed marriage or re-marriage of surviving spouse)	\$1,000
Marital Trust/Residuary Division	\$1,000
Pet Trust	\$350

### Planning with Minor Children

Guardianship/Conservatorship Provisions	\$250
Testamentary Trust Provisions in Will Package	\$250
Subtrusts Provisions In Living Trust or Asset Protection Trust	\$250

### Advanced Standalone Trusts

NFA Gun Trust	\$1,200
Qualified Personal Residence Trust	\$2,750
First Party Special Needs Trust (1st Party SNT)	\$3,000
Third Party Special Needs Trust (3rd Party SNT)	\$2,500
Irrevocable Life Insurance Trust (ILIT)	\$2,000
Stand-Alone Retirement Trust (SRT)	\$2,000
Medicaid Asset Protection Trust *only available with Platinum Plan	\$2,550
Veterans Affairs Asset Protection Trust *only available with Platinum Plan	\$2,550
Intentionally Defective Grantor Trust (IDGT) *only available with Platinum Plan	\$3,750
All Other Trusts	case by case

### Miscellaneous

Will Package (Solo)**	\$600
Will Package (Couple)**	\$900
Additional Deeds	\$350 each
Lady Bird Deed also known as an Enhanced Life Estate Deed (FL) or 1% Deed (NC or SC)	\$1,200

### Family Planning Services

Prenuptial Agreement	\$900
Post Nuptial Agreement	\$900
Additional Deeds	\$350 each
In-State Private Adoption	\$4,000
Inter-State (ICPC) Private Adoption	\$5,750

### Business Planning Services

LLC Formation	\$1,000
C-Corp/S-Corp Formation	\$2,500
FinCEN Reporting	\$250
Conveyance of Business Interest to Living Trust	\$550

\*\*price does not include upgrades such as guardianship/conservatorship provisions or testamentary trust provisions