LAW OFFICE OF
SHANNON R. SMITH
ESTATE PLANNING FOR FLORIDA FAMILIES
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PRICE SCHEDULE

ESTATE PLANNING

1. **Simple Probate Avoidance Trust Package:** **$2,000***

   - Revocable Living Trust
   - Pour Over Will
   - Financial Durable Power of Attorney
   - Advanced Directive/Designation of health care surrogate
   - Nomination of Conservator
   - HIPAA Release

2. **Add-ons:**

   - **Disability Planning: (Trust Package Only)** **$750**
     - Avoids Guardianship Court
     - Protects Trust Assets
     - Definition of Incapacity
     - Nomination of Disability Panel Members
     - Nominating Disability Trustees
     - Disability Preferences
     - Customized Directives

   - **Death Planning: (married couples only)**
     - **A/B Split:** **$750**
       - Asset Protection
       - Estate Tax Avoidance
       - Remarriage Protection
       - Irrevocable Trust Flexibility
       - Planning for Other Beneficiaries
       - Customized Trustee Instructions
     - **Qualified Terminable Interest Property Trust (QTIP):** **$350**
     - **Qualified Domestic Trust (QDOT):** **$750**

   - **Death Planning**
     - **Individual Trust Shares for Beneficiaries:** **$750**
       - Asset Protection
       - Divorce Protection
       - Planning for Other Beneficiaries
       - Dynasty Trust Planning
       - Customized Trustee Instructions
       - Spendthrift Trust / Incentive Trust
     - **Supplemental Needs Provisions:** **$0.00**
     - **Common Pot Trust Provisions:** **$350**
     - **Pet Trust:** **$400**

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3. **Simple Will Package:** **(Married couple) $1,750**
(Single Person) $1,500
   - Last Will & Testament
   - Financial Durable Power of Attorney
   - Advanced Directive
   - Designation of health care surrogate
   - Nomination of Conservator
   - HIPAA Release

❖ **Add-on to Will Package:**

- **Individual Trust Shares for Beneficiaries:** **(Married couple) $750**
  (Single Person) $500
  - Asset Protection
  - Divorce Protection
  - Planning for Other Beneficiaries
  - Dynasty Trust Planning
  - Customized Trustee Instructions
  - Spendthrift Trust / Incentive Trust

4. **Healthcare Package: (Married Couple)** **$1,000**

❖ Advanced Directive
❖ Designation of health care surrogate
❖ Nomination of Conservator

5. **Healthcare Package: (Single Person)** **$750**

❖ Advanced Directive
❖ Designation of health care surrogate
❖ Nomination of Conservator

6. **Amendments/Restatements**

❖ Restatement of entire plan drafted by Smith Law		**$2,000**
❖ Restatement of entire Estate Plan not drafted by Smith Law		**Pricing Page 1**
❖ Amendment to:	**Single**	**Married**
▪ Trust	**$700**	**$700**
▪ Healthcare Documents	**$250**	**$400**
▪ Financial Power of Attorney	**$200**	**$300**
▪ Pour-Over Will Codicil	**$350**	**$600**
❖ Codicil - Last Will & Testament Smith Law drafted Plan	**$750**	**$1,250**
❖ Codicil - Last Will & Testament Plan not drafted by Smith Law		**Pricing Page 2**

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7. Advanced Estate Planning

❖ Stand Alone Special/Supplemental Needs Trust	**$3000**
❖ Medicaid Trust	**$5000**
❖ Gun Trust	**$1500**
❖ Individual IRA Trust	**$5000**
❖ Domestic Asset Protection Trust	**$7500**
❖ Crummey Trust / Minor Trust (Section 2503)	**$2500**
❖ Charitable Planning:	**price varies**
▪ Charitable Remainder Trust	
▪ Charitable Lead Trust	
❖ Other Irrevocable Trust Planning	**price varies**

8. Miscellaneous

❖ Premarital Agreement:	**$2000 – drafting**	**$425/hr**
❖ Post-marital Separate Property Agreement:	**$2000 – drafting**	**$425/hr**
❖ Trust Administration	**$5,000 – retainer**	**$425/hr**
❖ Grant Bargain Sale Deed	**$150/Deed**	

BUSINESS / ASSET PROTECTION PLANNING

1. Business Formation: **$1,500.00**

- ❖ Prepare Articles of Incorporation/Organization
- ❖ Prepare Initial List
- ❖ File all formation documents w/ Secretary of State
- ❖ Draft Operating Agreement / Bylaws
- ❖ Prepare Initial Minutes
- ❖ Prepare Oaths
- ❖ Issue Ownership Certificates
- ❖ Assemble Corporate Book
- ❖ Deed preparation if applicable (extra fee for more than 4 deeds)

2. Amendment: **$ 1,000.00**

- ❖ Amend Articles of Incorporation/Organization
- ❖ Amend Annual List
- ❖ File all documents w/ Secretary of State
- ❖ Amend Operating Agreement / Bylaws
- ❖ Prepare Minutes
- ❖ Prepare New Oaths (if applicable)
- ❖ Re-Issue Ownership Certificates
- ❖ Update Corporate Book
- ❖ Deed preparation (extra fee for more than 4 deeds)

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3. Filing / Recording Fees:

- Secretary of State fees:
  - Articles of Organization: **$125 (one-time fee)**
  - Articles of Incorporation **$70 (one-time fee)**
  - Annual Report LLC: **$138.75 (annual fee)**
  - Annual Report Corp: **$150**
  - Amendment to LLC Articles **$50 (one-time fee)**
  - Amendment to Corp. Articles **$35 (one-time fee)**
  - Florida Business License **varies**
  - Foreign Business filings: **varies**

- County Recording Fees
  - County imposed Deed recording: **Varies by county**
    - Included – preparation of 4 Deeds
  - Additional fee per deed over 4 deeds **$150.00 (per deed)**

4. Other Fees

- Registered Agent Service: **$425/year (optional)**
  i. Accept service of process
  ii. Prepare and file Annual list with Secretary of State
  iii. Update Corporate Book

- Drafting other documents
  i. Buy/Sell Agreement: drafting: **$2500 $425/hr**
  ii. Rental Agreement: drafting: **$2500 $425/hr**

- Business Planning / Coaching: **$425/hr**
  i. Review / negotiate any of the above documents
  ii. Dissolution of business

- Further Assistance: **$425/hr**
  i. Extra meetings
  ii. Assistance funding

5. Trustee Fees

These fees are based on the fair market value of assets of the trust estate including stocks, bonds, promissory notes, other personal property and real property. Please note: the Firm generally does not serve as Trustee of a Trust created by the Firm. If you require that arrangement, Florida generally requires specific disclosures and a **separate signed acknowledgment.** These represent fees associated with the Firm being named as the Trustee of a plan created by a 3rd Party Attorney.

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- Trust – Continual Administration (billed quarterly in arrears)
  - i. First $1 Million **.6%**
  - ii. $1 million - $2 million **.55%**
  - iii. $2 million - $5 million **.5%**
  - iv. $5 million - $10 million **.45%**
  - v. Over $10 million **.4%**

- Trust Settlement (total settlement fee)
  - i. Simple Trust Settlement **$7,500**
    1. Fully funded trust; up to three bank/brokerage accounts; up to three adult beneficiaries receiving outright distributions; no real estate, business interests, disputes, or continuing trusts.
  - ii. Standard trust settlement **$12,500**
    1. Up to six financial accounts, five beneficiaries, and one Florida residence; ordinary outright distributions; no business operation, contested claims, or estate-tax return. Include routine coordination of the residence's sale or transfer.
  - iii. Complex trust settlement **Varies**
    1. Multiple properties, business interests, complex tax issues, substantial asset recovery, disputes, or funding multiple continuing trusts. Set the dollar amount after reviewing the assets and required work.
- Irrevocable Life Insurance Trust (per year):
  - i. First $1 million **$2,500**
  - ii. Each additional policy **$425**

* **Does not include State imposed Filing and/or Recording fees**