Estate Planning

Services and Pricing Guide

Powers of Attorney

INDIVIDUAL

Financial and Healthcare Powers of Attorney	$50

UPDATES

A discount is not available for POA updates, as each revision requires drafting a new document.

Will Package

INDIVIDUAL

Due upfront	$249
Due at delivery	$150
Total	**$399**

MARRIED

Due upfront	$498
Due at delivery	$300
Total	**$798**

OPTIONAL ADD-ONS

Retitling Transfer on Death Deed *(Per deed)*	$75

PACKAGE INCLUDES

- Last Will and Testament
- Financial and Healthcare Powers of Attorney
- Cloud Storage and Sharing

UPDATES

Within the first year	Free
Beyond the first year	$199

Trust Package

INDIVIDUAL OR MARRIED

Due upfront	$699
Due at delivery	$1,000
Total	**$1,699**

OPTIONAL ADD-ONS

Real Estate Retitling	$199
WI Transfer Return Prep *(Online services per property)*	$50

PACKAGE INCLUDES

- Revocable Living Trust
- Certification of Trust
- Pour-Over Wills
- Financial and Healthcare Powers of Attorney
- Cloud Storage and Sharing

UPDATES

Within the first year	Free
Beyond the first year	$249

Our Estate Planning Process

1. **Consultation Prep:** You'll complete the Estate Planning Appointment Guide before your first appointment.
2. **Consultation:** A simple questionnaire will guide you, your consultant, and an attorney in creating your estate plan.
3. **Document Creation:** An attorney from Estate Guru will review your estate needs and create the necessary legal documents. Your estate planning package will then be sent to our office to be reviewed, signed, and notarized during your follow-up appointment. In unique situations, an attorney may need to follow up with you to ask clarifying questions.
4. **Execution and Funding:** We will work with you to ensure your estate plan is executed and funded.
5. **Document Updates:** Life changes—and so might your estate planning needs. Whether it's a new family member, a change in assets, or an adjustment to your wishes, it's important to keep your will or trust up to date. If you need to make updates, simply reach out to our office. We'll walk you through the process and ensure your documents reflect your current intentions.

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