

	Will- Based Plan	Simple Trust	Standard Plan	Enhanced Plan
PROTECT YOUR ESTATE FROM PROBATE, WITH A SIMPLE TRUST	NO	YES	YES	YES
Direct personal property and money via outright distributions to spouse and adult children, and custodial accounts for children under 18	●	●	●	●
Up to 3 specific distributions of money or assets, but with no “strings” attached	●	●	●	●
Name a U.S.-based guardian for your children under age 18	●	●	●	●
Name a trusted person to handle your finances if you are unable to do so	●	●	●	●
Name a trusted person to make medical decisions for you if you are unable to	●	●	●	●
Basic protection for pets	●	●	●	●
Preparation of 1 California property deed		●	●	●
"Staged distributions" to children: such as 20% at age 25; remainder at age 35			●	●
Basic estate tax deferral			●	●
Disclaimer planning to care for both your children & spouse (if you are married)			●	●
Protect assets given to your spouse and children from remarriage and creditors				●
Protect blended families				●
Protect IRAs and 401(k)s from premature distribution				●
Plan for future disability – you or your spouse				●
Trust protector provisions				●
Specialized trust provisions for business owners				●
Protect your children and other loved ones from poor wealth management decisions and fiscal immaturity				●
PRICES				
Single	\$2400	\$4250	\$5700	\$6625
Married	\$3225	\$5300	\$6725	\$7650
ADDITIONAL COSTS, REQUIRED				
First design meeting, payable in advance.* \$100 discount if fee agreement is signed within 1 week of receipt.	+ \$650	+ \$650	+ \$650	+ \$650
Preparation of additional California property deeds	+ \$500	+ \$500	+ \$500	+ \$500
MORE OPTIONS				
Specific distributions of assets or dollar amounts with significant "strings" attached, such as incentive trusts	+\$450 ea.	+\$450 ea.	+\$450 ea.	+\$450 ea.
Facilitated family meeting to explain estate plan provisions & minimize disputes		+ \$650/hr.	+ \$650/hr.	+ \$650/hr.
"Non-mirrored" spousal trusts, so that spouses may make different arrangements for their respective beneficiaries				+ \$850
Legacy planning (generation-skipping trusts or dynasty trusts)				+ \$1500 min.
Protection for loved ones with special needs who would lose important governmental benefits (such as SSDI, SSI, Medi-Cal, etc.) if they received an				+ \$3500 min.
Special planning to protect separate property assets, such as a joint pour-over trust				+ \$7100
Advanced planning to minimize taxes, including tools such as SLAT, GRAT, irrevocable life insurance trusts, charitable trusts				By quotation
INTERNATIONAL PLANNING				
International will, if needed, for foreign assets	+ \$550	+ \$550	+ \$550	+ \$550
International guardianship provisions	+ \$550	+ \$550	+ \$550	+ \$550
Estate tax deferral trusts for non-US citizen spouses (Qualified Domestic Trusts)			+ \$800	+ \$800
Advanced international estate planning				+ \$5000 min.

Questions? Ready to schedule a meeting?
Contact Andrea: 650-325-8276 or andrea@calprobate.com