INTERVIVOS
Estate Planning Solutions

Products and Services Overview

Consultation Services:

The most value a client receives from meeting with an experienced attorney is often in the first half hour of consultation with them. While many estate planners offer free consultations, this incentivizes shopping around for the best price or the attorney avoids giving away too much information during a consultation. Inter Vivos PLLC, plans on charging a consultation fee in return for a productive and informative consultation experience. Any fee for consultation can be credited to a client's overall plan when the client chooses to engage the firm for services. Inter Vivos will waive the fee if a client comes to them as a referral from a trusted referral source. In addition, the firm plans to offer free group consultations on a regular basis. Otherwise, the following table reflects the firm's general fee structure.

Title:	Description:	Price/ Fee:
General Consultation	Client consultation usually lasting between 30 min to 1 hour, and advice letter addressing client's needs and engagement options.	**$150**
Estate Plan Review	Review of client's existing estate plan including an opinion letter advising client as to their needs and options.	**$150**
Simple Client Letter	Consultation and drafting/ review of a simple client letter related to the client's estate or financial planning situation	**$150**
Assorted Hourly Billing	Any non-flat fee work performed will be billed at each attorney's chosen billing rate. The base rate for the firm is reflected here.	**$200**

Stand Alone Basic Document Set Options:

These packages address a specific client need and may be offered as a standalone set to supplement an existing estate plan or as an add-on to a client's full estate plan. Generally, extremely simple situations might call for one of these sets, while a complete plan offered by our firm would already include these documents.

Title:	Description:	Price/ Fee:
Life Plan Document Set	Set of documents addressing incapacity including Powers of Attorney, Healthcare Directives, and HIPAA Authorizations	**$250**
Transfer Plan Document Set	Set of documents addressing a client's need for funding of an entity includes changing title for up to 6 assets,	**$250**
Family Plan Document Set	Set of documents addressing the care and protection of minor children includes guardian designations, care plan, and POA	**$250**
Niche Plan Document Set	Set of documents addressing a specific need for niche planning, generally as an add- on for a regular complete estate plan	**$250**

Basic Estate Planning Options:

The firm's intention for every client is to give them a personalized plan for their situation, which is likely to address a client's most important needs at the most affordable price. The firm will not offer a lower cost planning option to a client whose situation requires a more complete solution. The following are guidelines for what a client can expect from product packages.

Title:	Description:	Price/ Fee:
Probate Avoidance Plan	Planning session and assistance with documents needed for a client to arrange their estate to avoid probate without a will or a new trust; may include document sets described above.	**$500**
Will Based Estate Plan	Includes wills and supporting documents. Recommended only for clients who do not have children and/ or are not homeowners.	**$500- 1000**
Trust Based Estate Plan	Includes trust and supporting documents. Recommended only for clients with a simple situation, low net worth, or without the need for funding assistance.	**$750- 1200**
Comprehensive Estate Plan	Includes trust and supporting documents. Personalized provisions addressing extra needs/ documents, initial funding of trust plan, tiered pricing is based on how complex the plan becomes.	**$1500- 2500**

Specialty Estate Planning Options:

Higher end or specific trust planning strategies generally require the creation of additional entities. These may become standalone plans or add-ons to a complete estate plan. The majority of specialty options are irrevocable trusts which address particular client needs requiring a new, separate trust or entity not includable in a comprehensive revocable living trust plan. If a client chooses a specialty plan option as an add-on to a comprehensive plan, a discount of up to $500 may be credited toward their overall fees.

Title:	Description:	Price/ Fee:
International Estate Planning	Comprehensive estate plan in multiple jurisdictions. Includes initial funding for each plan and coordination of plans.	**$2000-4000+**
Asset Protection Planning	Standalone asset protection trusts as a separate part of overall estate plan. Either domestic, foreign, or offshore options.	**$2000-10,000+**
Charitable Trust Planning	Standalone charitable trust options including CRT, CLT strategies, may or may not include ILIT	**$2000-4000+**
Gift and Estate Tax Planning	Planning session and strategies to minimize taxes includes complex trust work if needed. GRTS, IDGTS, PRTS, etc.	**$2000-10,000+**
Special Needs Planning	Standalone trust options or guardianship and trust flat fee options. Used to plan and to retain special needs benefits	**$2000-4000+**
Complex Medicaid/ VA Planning	Planning session and strategies to minimize spend down and qualify for benefits. May include standalone trust or crisis plan.	**$2000-10,000+**
Complex Legacy Planning	Complex planning or standalone dynasty trust planning	**$3000-6000+**
Complex Digital Asset Planning	Standalone planning to preserve an extensive digital legacy or to protect significant intellectual property assets	**$3000-6000+**
Settlement Trust Planning	Creation of settlement trust to preserve government benefits	**$2000+**
Business Succession Planning	Planning and strategies to prepare for sale or transfer of a closely held business, may include deferred sales trust, buy sell agreements, negotiation sessions, IDGTS, etc.	**$500-4000+**

Niche Estate Planning Options:

Niche Estate plans are generally standalone plans addressing specific needs of a particular client demographic. The prices reflected here are for standalone plans aside from the niche document sets, although each may be integrated into a client's comprehensive estate plan if appropriate. If a client chooses a niche plan option as an add-on to a comprehensive plan, a discount of up to $500 may be credited toward their overall fees or the niche provisions may be added into the simple cost of the comprehensive plan, whichever comes out better for the client.

Title:	Description:	Price/ Fee:
Gun Trust Plans	Separate planning for large gun collections, NFA firearms, avoiding a gun ban, and gun legacy planning	**$500-1250+**
Immigrant Estate Plans	Separate planning for risk of deportation, tax liability, and international assets for immigrant families	**$1250-4800+**
LGBT Estate Plans	Separate planning for LGBT couples, partners, and/ or marriages	**$1250-4800+**
Native American Estate Plans	Separate planning for Native American families who may have lived on tribal lands, or own tribal property	**$1250-4800+**
Pre-nuptial/ Post-nuptial Agreements	Separate planning for Newlyweds, Married Couples, or engaged couples in order to plan for contingencies of divorce or passing, may be separate, collaborative, or comprehensive	**$500-4000+**
Pet Trust Plans	Separate planning for family pets, pet assets, and pet legacy planning	**$500-1250+**

Business Formation Options:

Business formations are often an important part of a client's overall estate planning strategy. These prices reflect the standalone rate for these services, although they can all be integrated into a client's estate plan option if desired. A client may receive up to $500 discount on the overall plan by adding an entity as part of a larger plan.

Title:	Description:	Price/ Fee:
LLC Formation	Formation and registration of limited liability company along with operating agreements and initial planning session.	**$750**
Series LLC Formation	Formation and registration of a series limited liability company including operating agreements and initial planning	**$1000+**
Foreign LLC Formation	Formation and registration of an out of state limited liability company including operating agreements and initial planning	**$1500+**

S-Corp Formation	Formation and registration of subchapter S corporation including operating agreements and initial planning	**$1000+**
L3C Formation	Formation and registration of low profit limited liability company including operating agreements and initial planning	**$1000+**
Family Limited Company Formation	Formation and registration of family limited company including operating agreements and initial planning session.	**$2000+**
Non-Profit Entity Formation	Formation and registration of not for profit corporation, private foundation, or other non-profit entity	**$2500-4000+**

Court Filing Options:

Court representation by the firm will largely if not entirely be limited to filings in the probate court. Any disputed actions will be limited to payment either by monthly flat rates or by hourly retainer. Flat fee options will be available for non-contested filings. Pricing for low end flat fee representation is equal to amounts that will be required to begin work under a retainer arrangement.

Title:	Description:	Price/ Fee:
Probate Estates	Filing and representation of a party to either a testate or intestate estate. Contested and uncontested options.	**$1500-3000+**
Trust Administration	Guidance and/or representation in respect to administration of an existing trust in a court proceeding	**$500-1500+**
Guardianship/ Conservatorships	Filing and representation of petitioning party for a guardianship and/or conservatorship. Contested and uncontested options.	**$1500-3000+**
Guardianship (Ward)	Representation of protected person in a guardianship/ conservatorship petition	**$500-1500+**
Name Change Petitiones	Filing and completion of name change for an adult.	**$1250+**
Qualified Domestic Relation Orders	Filing and completion of QDRO under a limited representation arrangement	**$500+**

Disclaimer: Please be aware that any and all prices and services indicated by this document are general in nature and may not be accurate for any specific client situation. Actual prices and fees for service will vary on a case by case basis and will be determined by the servicing attorney. These prices should not be relied upon, nor do they create a binding relationship of any kind. Cases do not enjoy attorney client privilege and prices are not binding until a retainer agreement is signed by the client and an attorney representing the firm.