

What's Included in Our Plans?

YOUR ESTATE PLAN FEATURES:	Sequoia	Willow	Spruce	Oak
Revocable Living Trust[†]	●	●	●	●
Certification of Trust	●	●	●	●
Pour Over Will(s)	●	●	●	●
Health Care Proxy	✓	✓	✓	✓
Living Will	✓	✓	✓	✓
HIPAA Authorization	✓	✓	✓	✓
Power of Attorney	✓	✓	✓	✓
Notarization and Scanning of Documents	✓	✓	✓	✓
Electronic copies of documents	✓	✓	✓	✓
Personal Property Memorandum	✓	✓	✓	✓
Location List and Binder	✓	✓	✓	✓
Instructions for Successor Trustee	✓	✓	✓	✓
Trust Disability Provisions				
Letter of Instructions to Health Care Agents & Trustees	✓	✓	✓	✓
Basic Disability Trust Provisions	✓	✓	✓	✓
Customized Disability Provisions through a Disability Panel	✓	✓	✓	
Written Opinion of Incapacity and Restoration	✓	✓	✓	
Funding				
Detailed Asset Table	✓	✓	✓	✓
(1) Deed, Homestead, & Trustee's Certificate <i>(recording fees included)</i>	✓	✓	✓	✓
Letters to Update Homeowners Insurance <i>(if applicable)</i>	✓	✓	✓	✓
Specific Funding Recommendations for all disclosed assets on table	✓	✓	✓	✓
Recommendations for Beneficiary Designations for Retirement Accounts	✓	✓	✓	✓
Minor Children & Beneficiaries (if applicable)				
Common (Single) Trust Provisions for Minor Children	✓	✓	✓	✓
Temporary Guardian Appointment for Minor Children	✓	✓	✓	✓
Letter of Instruction to Guardians & Trustees of Minor Children	✓	✓	✓	✓
Customized Ongoing Protective Trusts for Beneficiaries	✓	✓	✓	
Advanced Planning				
Planning for blended families/domestic partners*	✓	✓	✓	✓
Federal & MA Estate Tax Planning for Surviving Spouse <i>(if applicable)</i>	✓	✓	✓	
Remarriage protections <i>(if applicable)</i>	✓	✓	✓	
Guidance on Achieving your Philanthropic Goals <i>(if applicable)</i>	✓	✓	✓	
Planning for multi-generational wealth	✓	✓	✓	
Planning for complex asset types (e.g., closely-held stock, retirement accounts, life insurance)	✓	✓		
Complex Charitable Planning	✓	✓		
Planning for complex Generational Wealth Transfer [†]	✓			
Planning for non-US citizens or international real estate holdings	✓			
Fee	Sequoia Plan	Willow Plan	Spruce Plan	Oak Plan
Individual	\$17,000	\$12,500	\$8,000	\$5,750
Couple - Joint/Identical	\$19,000	\$14,500	\$10,000	\$7,500
Couple - Separate/Unique*	\$25,000	\$20,500	\$16,000	\$11,500

[†] additional meeting times not specifically included under the plan, and any customized language changes or additional beneficiaries' names (more than 3) under your Will or Trust may result in additional charges at the discretion of the attorney.

Attorney assigned to your plan is subject to availability and change.

Rates effective 3/2022 & are subject to change without notice.