

*Law Offices of
Dana F. Longo, A Professional Corporation
509 Brinkerhoff Avenue
Santa Barbara, California 93101
Phone: (805)963-6551
Fax: (805)963-2562*

ATTORNEY FEES FOR ESTATE PLANNING

The fees charged by this office for certain standard estate plans are:

- **Unmarried Persons:** Revocable Trust; Pour-Over Will; Durable Power of Attorney; and Advance Health Care Directive - **\$2,250** (base fee).
- **Married Couples:** Revocable Living Trust where total estate is less than the current estate tax exemption; Pour-Over Wills; Durable Power of Attorney forms; and Advance Health Care Directives - **\$2,750** (base fee).

If the tax plan involves three trusts (A, B, and QTIP), the fee will usually be more, depending on the legal time required.

These fees include the following services:

- 45 minute initial consultation at no charge, additional time will be billed hourly. If hired, such time will be included in the flat fee.
- Initial conference and a document-signing conference with the attorney.
- A first draft of the estate-planning documents and any revisions to the first draft that the client may wish to make, to the extent of one hour of attorney and one hour of paralegal time in documents revision and related discussions with client.
- Transfer of one piece of California real estate to the trust.
- Any time spent on additional drafts or services will be billed on an hourly basis.
- Fees for more sophisticated estate tax minimization techniques or for matters with more involved legal issues will be quoted upon discussion with Mr. Longo.

Hourly fees are based as follows:

- Attorney, Dana F. Longo - \$360/hr.
- Paralegal - \$210/hr.
- Secretary – No Charge

If more than 60 days elapse without contact from the client after mailing the first draft of the estate planning documents, or if the client decides not to sign the prepared documents, the client will be billed for the hourly time spent up to that point, and the flat fee agreement will be converted to an hourly arrangement for the services rendered in finalizing the estate plan.