



Rate Sheet

Essentials

Comprehensive review of the deceased's estate planning documents.
Preparation of a checklist and roadmap for an executor or trustee to administer the estate.

\$8500

Estate Management Counsel

Advise and work closely with the executor or trustee. Prepare documentation necessary to administer the estate, including sub-trusts and transfers of real property. Coordinate with third-party consultants such as appraisers, accountants, or engineers throughout the distribution of the estate.

Counsel: \$425 per hour / Paralegal: \$110 per hour

Estate Executor or Trustee

Comprehensive estate administration, including distribution of assets, administering ongoing subtrusts, preparing and overseeing transfers of real property, representing the estate in probate, and coordination of third-party consultants such as appraisers, accountants, or engineers.

Excludes legal representation for claims and disputes among beneficiaries or any audits, appeals, or actions brought by the Internal Revenue Service.

Tiered annual fee structure, calculated as a percentage of trust assets while serving as Executor / Trustee.