ESTATE PLANESQ

LAW OFFICE OF KEITH R. MILES, LLC/PLLC

SERVICES AND PRICING RANGES

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NOTE: THIS IS NOT AN EXHAUSTIVE LIST. IT INCLUDES THE MOST FREQUENT.

Medicaid Planning

Service	Description	Price Range
Prospective Medicaid Planning	Proactive strategies developed before care is needed to preserve assets and ensure Medicaid eligibility. • Medicaid Asset Protection Trust (MAPT) Design • Income and Resource Eligibility Review • Implementation of Gifting, Transfer, and Spend-Down Plans	$7,500 – $12,000 depending on complexity and marital status
Crisis Medicaid Planning	Immediate planning when a client or spouse is already in or entering nursing home care to protect assets under current rules. • Crisis Asset Assessment & Conversion • Medicaid Application and Documentation Preparation • Spousal Resource Allowance and Community Spouse Protection	$10,000 – $20,000+ depending on urgency and number of assets involved

Estate Planning

Service	Description	Price Range
Will Package	Foundational plan including a Last Will and Testament, Financial Power of Attorney, Advance Directive for Health Care, and HIPAA Authorization — covering essential lifetime protections.	$1,500 – $2,500
Revocable Trust Package	Comprehensive plan including a Revocable Living Trust, Pour-Over Will, Powers of Attorney, and Advance Directive — designed to avoid probate and streamline inheritance.	$4,000 – $9,000
Irrevocable Trust Planning	Advanced estate and asset protection strategies using Irrevocable Trusts, Inheritance Protection Trusts, and Tax-Sensitive Trusts.	$12,000 – $20,000+ depending on complexity and tax objectives

Special Needs Planning

Service	Description	Price Range
First-Party Special Needs Trust (SNT)	Trust established with the beneficiary's own assets (e.g., inheritance, settlement, or savings) to maintain eligibility for SSI and Medicaid benefits while providing supplemental support.	$5,000 – $7,000 depending on complexity and funding sources
Third-Party Supplemental Needs Trust (SNT)	Trust funded by parents, family members or others to provide lifetime financial support for a loved one with disabilities without affecting government benefit eligibility.	$5,000 – $6,000 depending on structure and family objectives