



**SERVICES AND
PRICING RANGES
OCTOBER 2025**

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

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Elder Law & 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

Taxation and IRS Representation

Service	Description	Price Range
IRS Representation & Tax Resolution	Address liens, levies, and noncompliance through installment agreements or Offers in Compromise.	\$3,000 – \$10,000
Gift & Transfer Tax Coordination	Prepare and file Form 709 for gifts and coordinate with estate and Medicaid transfers.	\$750 – \$2,000
Fiduciary Income Tax (Trusts & Estates)	Prepare Form 1041 returns, issue K-1s, and manage fiduciary income allocation.	\$3,000-\$5,000 per return
Estate & Inheritance Tax Compliance	File Form 706 returns, portability elections, and reconcile basis adjustments.	\$5,000 – \$15,000+
Retirement & Distribution Tax Strategy	Advise on RMDs, Roth conversions, and charitable distribution planning.	\$1,500 – \$3,500
Special Needs Trust Tax Compliance	File fiduciary returns for SNTs and ensure ongoing IRS and SSA compliance.	\$1,500 – \$3,000 per trust annually
IRS Representation for Fiduciaries	Represent executors or trustees in audits, CP2000 responses, and tax clearance requests.	\$5,000 – \$10,000+