



**SERVICES AND
PRICING RANGES
SUMMARY**

OCTOBER 2025

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ESTATE PLANNING: TRADITIONAL ESTATE PLANNING

Last Will and Testament Packages

Price Range (Single): \$1,500 – \$2,500

Price Range (Married): \$2,500 – \$4,000

What Clients Receive	Monetary Benefits	Non-Monetary Benefits
<ul style="list-style-type: none"> • Initial strategy session (60 minutes) • 1 review meeting for approval of drafts and final signing • 1–2 revisions to core documents (Will, POA, Advance Directive, HIPAA Release) • Comprehensive estate planning binder with signed originals 	<ul style="list-style-type: none"> • Lower upfront costs compared to trust-based planning • Avoidance of unnecessary court disputes • Cost efficiency for straightforward estates 	<ul style="list-style-type: none"> • Wishes legally enforceable • Incapacity protection via POA and health directives • Clear guidance during probate

Revocable Trust Packages

Price Range(Single): \$4,500 – \$7,000

Price Range (Married): \$6,000 – \$10,000

What Clients Receive	Monetary Benefits	Non-Monetary Benefits
<ul style="list-style-type: none"> • Initial strategy session (60 minutes) • 1–2 review meetings for draft approval and signing • 2 sets of revisions to Will, Revocable Trust, POA, Advance Directive, HIPAA Release • Comprehensive binder with detailed instructions • Trust funding guidance and coordination with 	<ul style="list-style-type: none"> • Probate avoidance (savings \$10,000–\$25,000+) • Protection of family privacy • Cost efficiency compared to crisis planning 	<ul style="list-style-type: none"> • Immediate asset management if incapacity occurs • Reduced family conflict • Simplified administration • Peace of mind avoiding burdensome court process

financial institutions • Step-by-step implementation roadmap for family members		
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Irrevocable Trust (Tax & Asset Protection) Packages

Price Range (Single): \$9,000 – \$15,000

Price Range(Married): \$15,000 – \$20,000+

What Clients Receive	Monetary Benefits	Non-Monetary Benefits
<ul style="list-style-type: none"> • Initial strategy session (60 minutes) focused on advanced planning • 2–3 review meetings for complex drafting and signing • 2 sets of revisions to Irrevocable Trust, Will, POA, Advance Directive, HIPAA Release • Comprehensive binder with detailed tax/asset protection instructions • Trust funding coordination with financial institutions and advisors • Integration with estate, gift, GST and income tax planning strategies 	<ul style="list-style-type: none"> • Potential estate tax savings (millions possible) • Protection of family wealth from long-term care costs, creditors, lawsuits • Preservation of assets for heirs and charities 	<ul style="list-style-type: none"> • Peace of mind with safeguarded assets • Proactive planning vs. crisis planning • Reduced forced asset liquidation risk • Preservation of family legacy

ELDER LAW: LONG-TERM CARE AND MEDICAID PLANNING (50+)

Long-Term Care and Medicaid Planning (50+)

Price Range(Single): \$7,500 – \$15,000

Price Range(Married): \$10,000 – \$20,000+

What Clients Receive	Monetary Benefits	Non-Monetary Benefits
<ul style="list-style-type: none">• Initial consultation (60 minutes)• 2–3 review meetings throughout the process• 2 sets of revisions to planning documents• Customized Medicaid asset protection trust or spend-down strategy• Preparation and filing of Medicaid application (if part of the engagement)• Binder of executed documents (POA, ADH, HIPAA, Trusts, etc.)• Coordination with financial institutions and healthcare facilities	<ul style="list-style-type: none">• Preservation of \$100,000s in assets• Potential to save \$7,000–\$12,000+ per month in nursing home costs• Avoidance of Medicaid penalties and spend-down errors	<ul style="list-style-type: none">• Peace of mind that loved ones are protected• Confidence navigating a complex system• Reduced stress for family caregivers• Preservation of family legacy and dignity

SPECIAL NEEDS PLANNING

First-Party Special Needs Trusts

Price Range(Single only): \$5,000 – \$8,000

What Clients Receive	Monetary Benefits	Non-Monetary Benefits
<ul style="list-style-type: none"> • Initial planning consultation (60 minutes) • 1–2 review meetings (document review and finalization) • 2 sets of revisions to trust documents and related materials • Drafting and execution of a First-Party Special Needs Trust (funded with the beneficiary's own assets) • Coordination with financial institutions and public benefits agencies • Planning binder with instructions for trustees and family members • Education for family members on administration and compliance 	<ul style="list-style-type: none"> • Preservation of eligibility for SSI, Medicaid, and other public benefits (worth thousands annually) • Protection of lawsuit settlements, inheritances, or personal assets from being consumed by care costs • Long-term stability for the individual with special needs 	<ul style="list-style-type: none"> • Peace of mind knowing self-owned assets are safeguarded without losing benefits • Assurance of compliance with Medicaid payback requirements • Family relief from fear of financial exploitation or mismanagement • Clear roadmap for successor trustees on ongoing administration

Third-Party Supplemental Needs Trusts

Price Range(Single): \$5,000 – \$6,000

Price Range(Married): \$6,000 – \$8,000

What Clients Receive	Monetary Benefits	Non-Monetary Benefits
<ul style="list-style-type: none"> • Initial planning consultation (60 minutes) • 1–2 review meetings (document review and finalization) • 2 sets of revisions to trust documents and related materials • Drafting and execution of a Third-Party Supplemental Needs Trust (funded with 	<ul style="list-style-type: none"> • Preservation of eligibility for SSI, Medicaid, and other public benefits (worth thousands annually) • Ability for parents, grandparents, or relatives to leave assets without jeopardizing benefits • Flexibility in how family resources are used to 	<ul style="list-style-type: none"> • Peace of mind knowing a loved one is supported beyond the parents' or caregivers' lifetimes • Assurance that government benefits remain intact while family contributions enhance quality of life • Reduced burden on siblings or relatives by

gifts, inheritances, or family contributions) <ul style="list-style-type: none">• Coordination with financial institutions and integration with estate planning strategies• Planning binder with instructions for trustees and family members• Education for family members on administration and compliance	supplement care and quality of life	providing a clear structure for financial support <ul style="list-style-type: none">• Family harmony preserved by removing uncertainty and reducing disputes
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ELDER LAW: MISCELLANEOUS AREAS

Nursing Home Admission & Discharge Advocacy

Price Range: \$3,500 – \$8,000

What Clients Receive	Monetary Benefits	Non-Monetary Benefits
<ul style="list-style-type: none"> • Review of admission contracts to prevent abusive clauses • Advocacy in discharge or transfer disputes • Representation in administrative appeals and hearings 	<ul style="list-style-type: none"> • Avoidance of unexpected charges and penalties • Protection from financially harmful arbitration clauses 	<ul style="list-style-type: none"> • Reduced stress during vulnerable health transitions • Peace of mind that rights are defended

Housing Rights & Senior Living Contracts Review

Price Range: \$2,000 – \$5,000

What Clients Receive	Monetary Benefits	Non-Monetary Benefits
<ul style="list-style-type: none"> • Legal review of assisted living, independent living, or CCRC contracts • Identification of hidden fees and resident rights issues • Negotiation of fairer terms when possible 	<ul style="list-style-type: none"> • Prevention of unexpected financial obligations • Better protection of housing deposits and assets 	<ul style="list-style-type: none"> • Transparency about rights and responsibilities • Confidence in choosing a safe and fair community

Elder Mediation & Family Caregiver Agreements

Price Range: \$3,000 – \$8,000

What Clients Receive	Monetary Benefits	Non-Monetary Benefits
<ul style="list-style-type: none"> • Drafting of formal family caregiver agreements • Mediation between siblings and caregivers regarding care responsibilities • Structuring payments and expectations to avoid disputes 	<ul style="list-style-type: none"> • Legitimate compensation to family caregivers • Documentation preventing later Medicaid penalties 	<ul style="list-style-type: none"> • Reduced family conflict • Clarity of responsibilities in caregiving roles

Personal Care Plan

Price Range: \$2,000 – \$5,000

What Clients Receive	Monetary Benefits	Non-Monetary Benefits
<ul style="list-style-type: none"> • Customized care instructions for medical, daily living, and personal preferences • Integration with powers of attorney and advance directives • Annual or as-requested updates to reflect client wishes 	<ul style="list-style-type: none"> • Avoidance of unnecessary facility charges • Prevents disputes over unclear care preferences 	<ul style="list-style-type: none"> • Preserves dignity and autonomy • Provides a clear caregiving roadmap for family

Letters of Instruction

Price Range: \$2,000 – \$5,000

What Clients Receive	Monetary Benefits	Non-Monetary Benefits
<ul style="list-style-type: none"> • Personalized letter detailing financial, personal, and legacy wishes • Guidance supplementing estate planning documents • Editable by client over time as circumstances change 	<ul style="list-style-type: none"> • Reduces costs and waste in estate settlement • Minimizes confusion and mistakes during transition 	<ul style="list-style-type: none"> • Provides clarity and reassurance for loved ones • Ensures personal values and legacy are carried forward