

2018 ESTATE PLANNING AND ASSET PROTECTION FEE SCHEDULE

ESTATE PLANNING FEES

A. WILL BASED PLANS (Prices shown are minimum)

Initial(s) Fee

_____ Will Plan for Individual with Outright Gifts to Beneficiaries....	\$1,000
_____ Will Plan for Individual with Trusts for Beneficiaries.....	\$1,500
_____ Will Plans for Couple with Outright Gifts to Beneficiaries.....	\$1,850
_____ Will Plans for Couple with Trusts for Beneficiaries.....	\$2,750
_____ Will Plans for Individuals with Estate Tax Planning.....	\$3,100
_____ Will Plans for Couple with Estate Tax Planning.....	\$5,500

B. REVOCABLE LIVING TRUST PLANS (Prices shown are minimum)

Initial(s) Fee

_____ Revocable Living Trust Plan for Individual with Outright Gifts.....	\$2,650
_____ Revocable Living Trust Plan for Individual with Sub-Trusts.....	\$3,770
_____ Revocable Living Trust Plans for Couple with Outright Gifts.....	\$5,050
_____ Revocable Living Trust Plans for Couple with Sub-Trusts	\$7,250
_____ Revocable Living Trust Plan for Individual with Estate Tax Planning...	\$5,950
_____ Revocable Living Trust Plans for Couple with Estate Tax Planning.....	\$9,950

C. MEDICAID PLANNING (Prices shown are minimum)

GEORGIA: The Usual Beginning charge for Medicaid Planning is the 2018 Monthly Divisor for which is \$6,175.

NORTH CAROLINA: The Usual Beginning charge for Medicaid Planning is the 2018 Monthly Divisor for which is \$6,300.

SPECIAL NEEDS TRUSTS PLANNING (Prices shown are minimum)

The Usual Beginning charge for Special Needs Trusts Planning is \$3,000.

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D. ADVANCED ESTATE PLANNING

Advanced planning strategies involve the use of advanced estate, asset protection and tax planning techniques. The goal is to analyze a client's specific circumstances and minimize estate, income, gift and GST taxes while simultaneously providing maximum asset protection and wealth transfer flexibility in-line with the client's goals and objectives. Often, the assets being transferred will require appraisals and due to the case-specific nature of advanced planning it is impossible to quote a fee without having an initial consultation.

1. Irrevocable Trusts

- o Intentionally Defective Grantor Trust
- o Inheritor's Defective Grantor Trust
- o Life Insurance Trust
- o Completed Gift Trust
- o 2503(c) Minor's Trust

2. Split Interest Trusts

- o QPRT
- o Grantor Retained Trust

3. Business Succession Planning

- o Buy-Sell Agreement
- o Family Limited Partnership
- o Limited Liability Company

4. Charitable Planning

- o Lead Trust
- o Remainder Trust
- o Private Foundation

5. QTIP Trust

- Standalone Retirement Trust
- Supplemental Needs Trust

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ASSET PROTECTION PLANNING FEES

ASSET PROTECTION PLANS (Prices shown are minimum)

Initial(s) Fee

_____ Domestic Law Asset Protection Plan for Individual.....	\$9,000
_____ Domestic Law Asset Protection Plan for Couple.....	\$15,000
_____ Foreign Law Asset Protection Plan for Individual.....	\$21,000
_____ Foreign Law Asset Protection Plan for Couple.....	\$31,000

Initial(s) _____ Fee _____
 \$ _____

Total Fee for Services Approved by Client(s): \$ _____

Client(s) must deposit a fee equal to one-half (1/2) of the total fee as a retainer for THE LAW OFFICE OF KRM for legal services to begin.

This retainer is non-refundable and due at signing to retain services and begin the legal drafting process.

YOU MUST PAY EITHER THROUGH THE CLIENT PORTAL WHERE YOU WILL BE INVOICED (TO PAY BY EITHER CREDIT, DEBIT OR CHECK) OR OUTSIDE THE PORTAL BY PAYPAL ONLY.

The balance is considered earned and due the earlier of the formal signing meeting or 30 days from mailing the first drafts to you.

You agree that you will not delay (i) reviewing your first drafts, (ii) providing Law Office of KRM necessary information, and/or (iii) scheduling a formal signing of your estate planning documents. You agree that KRM’s responsibilities under this Agreement shall terminate upon six calendar months from the date of its signing.

If you choose to delay (i) reviewing your first drafts, (ii) providing the Law Office of KRM necessary information, and/or (iii) scheduling a signing meeting, any of which delay the completion of your estate planning beyond six months from the date of this Agreement, a newly signed and dated Agreement will be required, and an additional fee equal to at least one-third of the total fee stated above will be due and owing before THE LAW OFFICE OF KRM returns to working on your estate plan(s).

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This extra fee is meant to appropriately compensate THE LAW OFFICE OF KRM for the extra time spent on your case. It is in your best interest to be diligent in working towards the completion of your estate plan(s). Please do not procrastinate after we start the estate planning process.

It is common for a couple to employ the same attorney to assist them in planning their estates. You have taken this approach by asking THE LAW OFFICE OF KRM to represent both of you, collectively. Accordingly, matters that one of you might discuss with THE LAW OFFICE OF KRM may be disclosed to the other of you.

Ethical considerations prohibit THE LAW OFFICE OF KRM from agreeing with either of you to withhold information from the other. In this representation, THE LAW OFFICE OF KRM will not give legal advice to either of you or make any changes in any of your estate planning documents without your mutual knowledge and consent. If a conflict of interest arises between the two of you during the course of your planning or if the two of you have a difference of opinion, THE LAW OFFICE OF KRM can point out the pros and cons of your respective positions or differing opinions. However, ethical considerations prohibit THE LAW OFFICE OF KRM, as the attorney for both of you, from advocating one of your positions over the other.

Furthermore, THE LAW OFFICE OF KRM would not be able to advocate one of your positions versus the other if there is a dispute at any time as to your respective property rights or interests or as to other legal issues between you. If actual conflicts of interest do arise between you of such a nature that in THE LAW OFFICE OF KRM's judgment it is impossible for THE LAW OFFICE OF KRM to perform its ethical obligations to both of you, it would become necessary for THE LAW OFFICE OF KRM to withdraw as your attorney.

The undersigned confirm(s) that he/she understands and agree(s) to the fee(s) stated above, billing procedure, and terms of representation.

Client's Signature

Date

Client's Signature

Date

Law Office of Keith R. Miles, LLC

Date