

VOLO LAW

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FEE AGREEMENT

June 8, 2018

1. **Fee.** I will charge you a flat fee of \$550 to prepare a living will and trust package, including:

- Revocable Trust;
- Pour Over Wills for each Spouse;
- One (1) Grant Deed to transfer the real property to the trust (each additional property is an extra \$125 plus notary and recordation);
- Certificate of Trust;
- Assignment of Personal Property to transfer all personal property to the trust;
- Assignment of Business, if applicable;
- Medical Directives for each Spouse;
- HIPPA forms
- Guardianship Nomination (if applicable); and
- Letter to Client Explaining Trusts.
- Letter Regarding Estate Tax Exemption

This fee does not include the County Recorder fee to record the deed (about \$30 for owner occupied but \$100 for investment property) or the notary fee (about \$90 for a married couple and \$45 for a single person)

2. **Insurance.** In accordance with the requirements of California Business and Professions Code § 6148, we advise you that we do not maintain professional insurance coverage applicable to the services to be rendered to you.

The undersigned hereby agrees that the terms and conditions in this letter and the accompanying Terms of Retention shall apply to services rendered by Volo Law.

Dated: _____

Client:

Dated: _____

Client: