

*The Law Office*  
*Of*  
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**Fee Schedule**  
**Estate Planning**  
**2012**

The following schedule sets forth Standard and Supplemental Fees for estate planning representations. The fees are intended to reflect the overall value of the services provided, as well as the anticipated time and effort involved.

**I.**

**Services Covered by Standard Fee**

**A.** Initial consultation, to include review of client's financial information and existing estate planning documents.

**B.** Recommendation of comprehensive estate plan, including changes in asset ownership and gifts between spouses.

**C.** Preparation of the following documents and information for client (and spouse, if applicable), addressing estate tax planning, property dispositions, minor's trust, guardians, and fiduciaries, as applicable:

1. Last Will and Testament

2. Durable Power of Attorney; Durable General Power of Attorney

3. Advance Medical Directive

4. Recommendations of beneficiary designations for retirement accounts, annuities, and life insurance, as well as property ownership reallocations as may be advisable

**D.** Supervised execution of estate planning documents.

**E.** Delivery of executed original documents in personalized covers.

The Standard Fee includes the cost of the initial estate planning consultation. If, however, the client declines the estate planning engagement, there is a charge of \$250 for the consultation payable at that time.

Expenses incurred for filing fees, recording costs, messenger service, express mail and similar costs are charged in addition to the fees. Travel within the Greater Richmond area, long distance telephone calls, and photocopying are provided without charge.

**II.**  
**Standard Fee for Estate Planning Services**

<u>Estate Value<sup>1</sup></u>	<u>Married Couple</u>	<u>Single Person</u>
Under \$5,000,000	\$ 850.00	\$ 750.00
\$5,000,000 - \$10,000,000	\$1,250.00	\$ 950.00

**III.**  
**Supplemental Fee for Other Estate Planning Services**  
**[Added to Standard Fee]**

Special Needs Trust	-	\$ 400
Deed of Gift (single parcel in Virginia)	-	\$ 400
Revocable Grantor Trust		
Single Person	-	\$ 850
Married Couple	-	\$1,250
Premarital Agreement	-	\$1,250

**IV.**  
**Payment; Timing**

If you decide to engage my services, I request full payment of the Standard Fee and Supplemental Fee be remitted at the first meeting.

The fee is earned and non-refundable when draft documents of your estate plan are thereafter prepared and sent to you.

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<sup>1</sup> Estimated value of existing assets subject to federal estate tax (including face amount of life insurance), reduced by outstanding debts, as determined from financial information provided by client.

Within five to seven business days of our first meeting, draft documents of your estate plan will be prepared and made available to you for your review and comment and they will be sent to you email, fax, or mail, whichever is most convenient for you, following which a telephone conference will be scheduled to discuss any comments you may have about the draft documents.

I ask that you plan to schedule a second meeting within two weeks of our first meeting, so that you may execute your estate planning documents, with a notary and witnesses present (which I will arrange).

Except in unusual circumstances discussed and approved beforehand, all estate planning representations are expected to be completed within two to four weeks of our first meeting. Once the draft estate planning documents are delivered to you, and if more than thirty (30) days pass without their completion and signature because of additional time requested by the client, then additional legal fees may be charged in an amount determined by me, or the representation may be terminated without completing or signing the documents and with all fees deemed earned and paid and not subject to refund.

Please bring your calendar with you to our first meeting so that we may schedule the subsequent meetings and conferences at that time.

Please know that I very much look forward to the opportunity to handle this important representation for you. With continuing best regards, I remain

Very truly yours,

*J. Steven Erie*

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