

Wills & Probate EXPRESS

By RS Johnson Legal, PC

Simple Will

This Will is best when you want to leave your assets to one person or to all of your children equally. It ensures that your heirs will not have to provide an insurance bond to the Court, which will save them money. Further, it allows you to designate that they will not have to provide detailed accountings and inventories to the Court. Most importantly, it ensures that your wishes and desires are carried forward in the exact manner you choose. **\$600**

Standard Will

The Standard Will is perfect for granting your assets to several people and for granting your assets in specific ways. You can choose to give individual gifts and specifically divide assets between your heirs. It allows for the specific creation of Trusts for minors and the designation of Trustees accordingly. You may also decide to identify your life insurance policies, 401K plans, bank accounts, and other items specifically. The Standard Will also provides the benefits mentioned above for the Simple Will. **\$750**

Standard Will with Testamentary Trusts \$1500

Testamentary Trusts are created at death. The trust language is placed in your last will and testament. The language here is similar to the language you may find in a living trust. The purpose is to leave an asset for the benefit of another person without giving it directly to them. Instead you appoint a Trustee that will serve as a fiduciary to manage the distribution of the asset(s) in the trust to one or several beneficiaries over time. Unlike a direct disbursement to a beneficiary under the will, this disbursement is made to a Trustee for the benefit of others.

Codicil

A Codicil is a simple modification to your original will. A modification may replace an executor for another, remove a person that has since deceased or add or remove assets to or from the original will. A codicil can also be used to exclude a beneficiary from the will that was originally listed. You may add or remove assets mentioned in a will or redirect assets to someone else. Generally, a codicil will not include a restructuring of the will or substantial modifications that would provide new or alternative directives. In some instances, we will recommend that you turnover the original will and do a new one. This is best in circumstances to avoid ambiguity and reduce the possibility of malfeasance or fraud. **\$400 for new clients (\$200 for returning clients)**

Living Trust (Revocable)

A Trust allows you to place all or some of your assets inside of the Trust during your lifetime. You will have ownership of the items through your Trust and the disbursement designations you have selected will carry forward. The Trust selection may include the need to create additional documents necessary to fund the trust and ensure the Trust has its desired effect.

One of the biggest benefits to creating a Trust it may help you avoid the probate process or limit the probate process. Your trustee will have access to needed funds immediately without the delay of waiting for a Probate process to be completed.

Trust Fees

Single Person \$3,000

Married Persons \$3,600

Additions to your Trust:

Special Needs / Minor Trusts \$600

Deed Transfers to Trust \$200

Trust Amendments and Restatements

Trust Amendments can be used to make minor changes to your trust. You may add or remove a beneficiary, change a trustee or add additional assets. However, this should not be a tool for making substantive changes to your trust. **\$1,200**

A Restatement of a Trust is a complete amendment of your trust. This generally would involve extensive changes to the trustee's instructions about how trust assets should be disbursed. It would be more involved than a standard amendment. In these instances, it is best to go back to the attorney that created the original trust, if possible. If not, know that a new attorney will have to resolve any ambiguity in the trust and understand the original goals of the drafter to make sure that any restatement made does not change the intended outcome unless it this out come is the subject of your restatement. **\$2,200** new trust clients **\$1,500** former trust clients.

Uncontested Probate Matters

We provide representation in uncontested matters for a flat fee of **\$2,700**. This fee includes your initial consultation, legal research, document preparation, reasonable dialogue with family and uncontested court representation. Court costs and third party fees are additional.

Contested

For contested matters, we assess a retainer in the range of **\$4,000 to \$10,000** depending on the circumstances of your case and bill against it at an hourly rate. The retainer may be higher depending on the circumstances. We will provide you an estimate of the time and expense expected for your particular case and request that you make deposits into your client account to prepay fees as needed. In all cases, we charge a reasonable rate and handle cases in the most efficient we charge a reasonable rate and handle cases in the most efficient way to avoid surprises and mounting legal fees. In limited cases, we may offer a hybrid option to pay portion of your free from the estate.

We offer flat rates, billable plans, and contingency plans on a limited basis. The hourly rate is **\$300.00** Contingency fees are higher since all or a portion of payment is deferred.

We want happy clients! We want you to see the value in our service and our approach.

Counsel and Coaching for Administrators and Executors

Once the court has appointed you to serve or granted the testators appointment, you may need guidance about next steps or how best to execute your duties. We offer a monthly pay plan for these clients. We will provide counsel or representation to for a fee of **\$350** per month. Flat fees start at **\$750** This amount is paid each month until you decide you have exhausted all assets and completed the service requirement or no longer need our services. This rate is discounted from our standard hourly rate of **\$300**.

Give us a call to discuss your case. 770-756-7264