ESTATE PLANNING

Here at Elegy, our goal is to help you organize your assets and wishes into a well-thought-out estate plan so that everything is handled smoothly for your loved ones in the future. Whether you're creating a will, setting up a trust, or making decisions about healthcare and finances, we are here to educate and guide you through each step. We make sure your plans are legally sound and tailored to your unique situation, giving you peace of mind that your legacy will be protected and your wishes respected.

Information Gathering

Prior to meeting, we will ask you to provide a few details so that we can make sure our representation of you does not create a conflict with any of our other clients. In estate planning, a common conflict involves representing multiple members of the same family, even if you have never been involved in litigation. If a family conflict exists, we will have all parties waive the conflict so that we are ethically allowed to represent you.

When all conflicts are cleared or waived, we will send you a confidential questionnaire to fill out before the meeting. The information you provide in the questionnaire will help us prepare for our meeting so that our time is as productive and efficient as possible. If you have existing estate planning documents, we will ask you to upload those documents for us to review.

Design Meeting

Once we confirm there are no conflicts and we receive your completed questionnaire and existing documents, we will schedule your initial meeting. At that meeting, we get to know each other, answer your questions, and discuss your goals and objectives for your estate plan. Some of the things we may cover include:

- Using a living trust to avoid probate and address tax planning opportunities
- Selecting successor trustees
- Designing a trust structure to protect your beneficiaries after your death
- Creating a durable power of attorney for your finances and selecting agents
- Creating an advance health care directive and selecting agents
- Naming guardians for minor children
- Funding your trust after you sign it

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Preparing Your Documents

After we cover your design preferences, we will prepare drafts of your estate planning documents along with a detailed letter to assist you in your review and upload the drafts to your client portal (we will mail physical drafts upon request). We can set up an additional phone call or meeting to go over any final questions you may have.

Signing Appointment

You may either sign your documents at our office or we can arrange for a notary to meet you conveniently at your home. If you prefer to sign at our office, we will finalize your documents and ensure that a notary and witnesses are available for the execution formalities. If you prefer to sign at home, we will finalize your documents, provide detailed signing instructions and arrange for a notary to arrive. We will advise you on selecting appropriate witnesses if needed, and we can arrange to be present at the signing via Zoom.

After you sign, we will process your documents, record any deeds, and advise you on funding your trust by updating title and beneficiary designations. Our engagement will convert to an hourly arrangement for any additional services beyond the initial estate planning project. We will offer a complimentary one-hour review every year thereafter to ensure that your estate plan continues to evolve with your life.

Pricing Plan

Fees for estate planning services depend on the type of plan requested. Most estate planning engagements are billed under flat fees arrangements ranging from $2,000 to $3,000 for a single person and $2,000 to $3,800 for a married couple.

We also offer flat fee and hourly hybrid engagements for more custom trust planning and advanced gifting and tax planning engagements. Custom trust planning engagements start at a flat rate base of $3,500 for a single person and $4,300 for a married couple for the underlying document preparation, with hourly billing for additional meetings and customized language. Advanced gifting and tax planning engagements start at a flat rate base of $4,500 for a single person and $4,800 for a married couple for the underlying document preparation, with hourly billing for additional meetings and counseling based on the specific needs of the plan.

elegy law LLP

Foundational Trust Planning

Individual	$2,000 – $3,000
Couple	$2,800 – $3,800

- Living Trust and Will
- Durable Power of Attorney
- Advance Health Care Directive
- Grant and Assignment
- Advanced protections for spouses and beneficiaries at higher end of range

Custom Trust Planning

Individual	$3,500 + hourly
Couple	$4,300 + hourly

- All Foundational Trust Planning features
- Customized trust language and structures
- Additional design meetings and guidance
- Additional trust funding guidance

Advanced Gifting and Tax Planning

Individual	$4,000 + hourly
Couple	$4,800 + hourly

- Irrevocable Trust and related documents
- Strategic gift and tax planning
- Multi-generational trust design
- Ongoing advisory support