

# Affordable Will & Trust Plans

**Best Suited for...**  


**Available Options (If Applicable)**

	Simple Will Package	Young Family Plan	Family Trust Plan <i>Flexibility &amp; Life Phases</i>	Advanced Family Legacy Plan
	No children; unmarried or all-to-spouse, parents, another person, or charity.	Young minor children, name guardians, all to spouse then children, includes minor trusts, no lifetime asset protection.	More privacy, continuous property, management, lasting control, probate court avoidance*, simplified updates, added protection for impaired judgment, special needs planning, blended families, 2nd marriage planning, asset protection for spouse or children, out of state property, plans for future move, etc.	All of the previous plan, PLUS families with a potential estate tax liability, or a desire for for tax flexibility and efficiency, or goals of multi-generational wealth transfer, generational wealth, etc.
Last Will & Testament(s)	✓	✓	✓	✓
Medical Incapacity Plan (MPOA, HIPAA, Living Will)	✓	✓	✓	✓
Property Incapacity Plan (Durable POA)	✓	✓	✓	✓
1 In-State Deed to Trust or 1-2 TODs for 1 Home	✓	✓	✓	✓
Declaration(s) of Guardian	--	✓	✓	✓
Minor Trust Provisions	--	✓	✓	✓
Family Trust Agreement	--	--	✓	✓
Lifetime Protective Children's Trust(s)	--	--	✓	✓
QTIP Trust Provisions	--	--	✓	✓
Children's Supplemental Needs Trust	--	--	✓	✓
Estate Tax, GST Tax, or Dynasty Trust Provisions	--	--	--	✓
<b>Individual</b>	<b>\$1,195</b>	<b>\$1,395</b>	<b>\$2,195</b>	<b>\$3,195</b>
<b>Couple</b>	<b>\$1,595</b>	<b>\$1,795</b>	<b>\$2,595</b>	<b>\$3,595</b>

Pricing valid through Dec. 2024.

\*Note: If trusts are fully funded and non-probate assets are planned for, probate might be possible to avoid completely.