



EMW LAW

SIGNATURE ESTATE PLANNING SERVICES FEE SCHEDULE

At EMW LAW, we utilize a bundled, flat-fee billing structure for certain legal matters. This means that we establish a set fee for each event or action in your case and group these services into bundled packages based on the different stages of the legal process. Clients are required to pay an initial retainer fee, covering both legal services and anticipated expenses, before we begin work on their case. Additional fees may be required at various stages of representation.

The initial retainer fee options outlined below cover the attorney's fees and expenses reasonably expected to be incurred in your matter based on the facts of your case

| Initial Retainer Fees | | |
|--|---|--------------|
| Bundled Legal Services | Estimated Expenses | Total Amount |
| Signature Will ¹ Plan for Individuals with in-office signing: \$1,400 + | <ul style="list-style-type: none"> • Printing: \$20 • Admin Costs: \$80 | \$1,500 + |
| Signature Will Plan for Individuals with remote signing: \$1,400 + | <ul style="list-style-type: none"> • Printing: \$20 • Admin Costs: \$80 • Courier: \$175 • Postage: \$75+ | \$1,750 + |
| Signature Will Plan for Individuals with mobile signing: \$1,400 + | <ul style="list-style-type: none"> • Printing: \$20 • Admin Costs: \$80 • Witnesses: \$150 • Notary: \$100 | \$1,750 + |
| Signature Will Plan for Couples with in-office signing: \$1,850 + | <ul style="list-style-type: none"> • Printing: \$40 • Admin Costs: \$110 | \$2,000 + |
| Signature Will Plan for Couples with remote signing: \$1,850 + | <ul style="list-style-type: none"> • Printing: \$60 • Admin Costs: \$140 • Courier: \$175 • Postage: \$75+ | \$2,250 + |
| Signature Will Plan for Couples with mobile signing: \$1,850 + | <ul style="list-style-type: none"> • Printing: \$60 • Admin Costs: \$140 • Witnesses: \$150 • Notary: \$100 | \$2,250 + |

¹ A Last Will and Testament ("Will") is a legal document that directs how a person's property is to be distributed at death, names a Personal Representative (Executor) to administer the estate, and may designate guardians for minor children. A Will becomes effective only upon death and, standing alone, generally requires probate to carry out its terms. The cost of preparing a Will varies depending on the complexity of the client's estate plan, the number and type of provisions required, and the time involved in drafting, reviewing, and revising the document. Factors that may increase the fee include, but are not limited to: Multiple or contingent beneficiaries; Unequal or customized distributions; Guardianship provisions for minor children; Trust provisions within the Will; and Significant revisions requested after initial drafts are provided.



EMW LAW

| Initial Retainer Fees | | |
|--|---|--------------|
| Bundled Legal Services | Estimated Expenses | Total Amount |
| Signature Trust ² Plan for Individuals with in-office signing: \$2,700+ | <ul style="list-style-type: none"> • Printing: \$60 • Admin Costs: \$140 • Portfolio Contents: \$100 | \$3,000 + |
| Signature Trust Plans for Individuals with remote signing: \$2,700 + | <ul style="list-style-type: none"> • Printing: \$60 • Admin Costs: \$140 • Portfolio Contents: \$100 • Courier: \$175 • Postage: \$75+ | \$3,250 + |
| Signature Trust Plans for Individuals with mobile signing: \$2,700 + | <ul style="list-style-type: none"> • Printing: \$60 • Admin Costs: \$140 • Portfolio Contents: \$100 • Witnesses: \$150 • Notary: \$100 | \$3,250 + |
| Signature Trust Plans for Couples with in-office signing: \$3,150 + | <ul style="list-style-type: none"> • Printing: \$100 • Admin Costs: \$150 • Portfolio Contents: \$100 | \$3,500 + |
| Signature Trust Plans for Couples with remote signing: \$3,150 + | <ul style="list-style-type: none"> • Printing: \$100 • Admin Costs: \$150 • Portfolio Contents: \$100 • Courier: \$175 • Postage: \$75+ | \$3,750 + |
| Signature Trust Plans for Couples with mobile signing: \$3,150 + | <ul style="list-style-type: none"> • Printing: \$100 • Admin Costs: \$150 • Portfolio Contents: \$100 • Witnesses: \$150 • Notary: \$100 | \$3,750 + |

² Our Signature Trust Plans begin at \$3,000. Descriptions of trusts we can create are outlined below.

- **A Living Revocable Trust** is a written legal instrument created by a person (the “Grantor”) during their lifetime to hold, manage, and distribute assets. While the Grantor is living and competent, the trust is revocable, meaning it may be amended, restated, or revoked at any time.
- **An Irrevocable Trust** generally cannot be modified or revoked once created, except under limited circumstances permitted by law. Because the client relinquishes certain ownership and control rights, irrevocable trusts may provide benefits such as creditor protection, Medicaid or asset-preservation planning, and estate or tax planning advantages. Irrevocable trusts require careful planning and may involve additional legal complexity.
- **A Special Needs Trust** is designed to hold assets for the benefit of a disabled individual without disqualifying that individual from needs-based government benefits such as Supplemental Security Income (SSI) or Medicaid. Trust assets are used to supplement—not replace—public benefits. Special Needs Trusts may be established as first-party, third-party, or pooled trusts, depending on the source of funds and the beneficiary’s circumstances.
- **A Supplemental Needs Trust** is similar to a Special Needs Trust and is used to enhance the quality of life of a beneficiary receiving public benefits by paying for items and services not covered by those benefits. The trust is structured to avoid distributions that would jeopardize eligibility for assistance programs.
- **A Spendthrift Trust** includes provisions restricting a beneficiary’s ability to transfer or assign their interest and limits access by the beneficiary’s creditors. These trusts are commonly used to protect assets for beneficiaries who may be financially irresponsible or vulnerable to creditor claims.
- **A Charitable Trust** is established to benefit one or more charitable organizations and may also provide tax benefits to the client. Examples include charitable remainder trusts and charitable lead trusts, which may provide income to the client or beneficiaries while supporting charitable causes.
- **A Testamentary Trust** is created under a will and becomes effective only upon the client’s death. Assets pass through probate before funding the trust. Testamentary trusts are often used to manage or protect assets for minor children, beneficiaries with special needs, or beneficiaries who require ongoing supervision.

Please note that not all trust types are included in every estate plan and the type of trust(s) created will depend on the client’s objectives and eligibility requirements.



EMW LAW

The fee schedule below outlines the legal fees applicable to each phase of a case. Not all fees will apply to every matter, and clients will only be charged for the services provided. All fees are due upon invoicing.

| Itemized Attorney's Fees | |
|---|---|
| Description | Amount |
| Remote Signing Ceremony | \$250 + |
| Mobile Signing Ceremony | \$500 + |
| Trust Funding | Varies |
| Transfer One (1) Parcel of Real Property to Trust via General Warranty Deed with Title | \$750 |
| Transfer One (1) Parcel of Real Property to Trust via Quitclaim Deed | \$500 |
| Transfer One (1) Item of Personal Property to Trust | \$250 + |
| Review and Analysis of Current Estate Plan Documents | 1 to 5 pages: \$500 6 to 10-pages: \$650 11 to 20-pages: \$800 21 to 30-pages: \$950 31 to 40-pages: \$1,100 41 to 50-pages: \$1,250 51 + pages: \$1,400+ |
| * Please note that miscellaneous tasks not explicitly listed in this list of attorney's fees will be billed at an hourly rate for time expended on client's behalf at the rate of \$350.00 per hour for attorneys and \$150.00 per hour for staff. | |



EMW LAW

Explanation of Fees

Our Signature Will Plan includes the following:

- In-depth 30-minute planning session with an Attorney (remote or in person);
- Custom last will and testament, advance healthcare directive (living will), and power of attorney (durable/springing³);
- In-depth 30-minute document review session with a Case Manager or Attorney (remote or in person);
- One round of revisions to documents before final signing;
- Facilitation of signing and/or notarization of final estate plan documents with witnesses and notaries in our office;
- Hand delivery of fully executed and notarized original documents;
- Electronic delivery of photocopied original documents via EMW Total Planning Portal;
- Access to the EMW Total Planning Portal with storage of documents and sharing capabilities; and
- Six (6) case status updates via MyCase message, including updates regarding the following:
 - Client Intake and Onboarding
 - Completion of Initial Draft of Estate Plan Documents
 - Scheduling and Recap of In-depth 30-minute document review session with a Case Manager or Attorney
 - Scheduling and Recap of Signing Ceremony

Our Signature Trust Plan includes the following:

- In-depth 1-hour planning session with an Attorney (remote or in person);
- Custom trust paperwork, pour-over will, advance healthcare directive (living will), and power of attorney (durable/springing);
- In-depth 1-hour document review session with a Case Manager or Attorney (remote or in person);
- One round of revisions to documents before final signing; and
- Facilitation of signing and/or notarization of final estate plan documents with witnesses and notaries in our office;
- Hand delivery of fully executed and notarized original documents in a fully loaded professional portfolio;
- Electronic delivery of photocopied original documents via EMW Total Planning Portal; and
- Access to the EMW Total Planning Portal with storage of documents and sharing capabilities.
- Six (6) case status updates via MyCase message, including updates regarding the following:
 - Client Intake and Onboarding
 - Completion of Initial Draft of Estate Plan Documents
 - Scheduling and Recap of In-depth 1-hour document review session with a Case Manager or Attorney
 - Scheduling and Recap of Signing Ceremony

³ A **Durable Power of Attorney** authorizes a trusted agent to manage your financial and legal affairs immediately upon signing and continues in effect if you later become incapacitated. A **Springing Power of Attorney** becomes effective only upon the occurrence of a specified event, typically a physician's written determination that you are incapacitated. The primary difference is when the authority begins—immediate versus conditional—which can affect ease of use and timing in urgent situations.



EMW LAW

Our Remote Signing Ceremony includes the following:

- Shipment of original documents to client at specified location with prepaid return envelope for return shipping;
- Facilitation of client signing of final estate plan documents in front of witnesses and notaries via recorded Zoom meeting;
- Facilitation of notary and witnesses receiving, signing, and stamping original documents in our office;
- Shipment of fully executed and notarized original documents to client at specified location; and
- Electronic delivery of photocopied original documents via EMW Total Planning Portal.
- Four (4) case status updates via MyCase message, including updates regarding the following:
 - Delivery of Estate Plan Before Signing Ceremony
 - Scheduling and Recap of Signing Ceremony
 - Delivery of Fully-Executed and/or Notarized Estate Plan Documents After Signing Ceremony

Our Mobile Signing Ceremony includes the following:

- Facilitation of signing and/or notarization of final estate plan documents with mobile notary and witnesses at a specified location within a 30-mile radius of our office;
- Hand delivery of fully executed and notarized original documents;
- Electronic delivery of photocopied original documents via EMW Total Planning Portal; and
- Two (2) case status updates via MyCase message, including updates regarding the following:
 - Scheduling and Recap of Signing Ceremony

Our Review and Analysis of Current Estate Plan Documents includes the following:

- In-depth review of current estate plan documents;
- In-depth 30-minute document review session with an Attorney (remote);
- Electronic delivery of professional opinion letter via secure client portal; and
- Three (3) case status updates via MyCase message, including updates regarding the following:
 - Client Intake and Onboarding]
 - Scheduling and Recap of In-depth 30-minute document review session with an Attorney

Our Transfer of One (1) Parcel of Real Property to Trust via Quitclaim Deed OR General Warranty Deed includes the following:

- Draft deed conveying real property;
- Obtain Grantor's e-signature on deed before notary;
- E-record notarized deed;
- If applicable, order and obtain title commitment and title search from title company;
- If applicable, confirm that all title requirements are met and obtain final title policy;
- Deliver electronic copy of recorded deed (and final title policy if applicable) to client via secure client portal; and
- Three (3) case status updates via MyCase message, including updates regarding the following:
 - Notarization and E-Recording of Deed
 - If applicable, Status of Title Commitment, Requirements, and Final Policy

Our Transfer of One (1) Item of Personal Property to Trust includes the following:

- Preparation of requisite paperwork conveying personal property to Trust;
- If applicable, notarization of Grantor's signature on requisite paperwork;
- Recording/filing/delivery of required paperwork with proper entity(s);
- Delivery of photocopied paperwork to client via secure client portal; and
- Three (3) case status updates via MyCase message, including updates regarding the following:
 - Signing and/or Notarization and Requisite Paperwork; and
 - If applicable, Confirmation of Effective Transfer