



**COMPREHENSIVE  
ESTATE PLAN**

- Detailed Estate Planning
- Living Revocable Trust
- Unlimited Trust Consultations
- Attorney Certification
- Individual Bequest Sheets
- Declaration of Intent
- Trustee Instructions
- Pourover Will and Living Will
- Advance Health Care Directive
- Durable Powers of Attorney
- Important Document Guide
- Personal Message Guide
- Notarization
- HIPAA Medical Information Release
- Bank, Stock Letters and Stationery
- Deed to Home and Tax Assessor Report
- Two Sets of Original Trust Documents
- Safe Keeping Document Service

**BASIC LIVING TRUSTS**

- |                                     |         |
|-------------------------------------|---------|
| <input type="checkbox"/> INDIVIDUAL | \$2,295 |
| <input type="checkbox"/> MARRIED    | \$3,295 |

**TRUST PROVISIONS**

- |   |                               |       |
|---|-------------------------------|-------|
| <input type="checkbox"/> AB                             | <input type="checkbox"/> DAB  | \$165 |
| <input type="checkbox"/> ABC                            | <input type="checkbox"/> QDOT | \$175 |
| <input type="checkbox"/> SPECIAL NEEDS TRUST PROVISION  |                               | \$175 |
| <input type="checkbox"/> REVOKE/RESTATEMENT PROVISION   |                               | \$175 |
| <input type="checkbox"/> SEPARATE PROPERTY DIRECTIVE    |                               | \$175 |
| <input type="checkbox"/> SUBSTANCE ABUSE PROVISION      |                               | \$175 |
| <input type="checkbox"/> GST OR OTHER SPECIAL DIRECTIVE |                               | \$175 |

**DEEDS**

- |                                     |       |  |       |
|-------------------------------------|-------|--|-------|
| <input type="checkbox"/> CA _____   | \$150 | <input type="checkbox"/> TITLE SEARCH        | \$ 75 |
| <input type="checkbox"/> OOS _____  | \$175 | <input type="checkbox"/> STOCK/LLC ASSIGNMNT | \$275 |
| <input type="checkbox"/> AFF. DEATH | \$150 |  |       |

**MISCELLANEOUS SERVICES**

- |  |             |
|--|-------------|
| <input type="checkbox"/> TRUST AMENDMENT                                     | \$450       |
| <input type="checkbox"/> DURABLE POWERS OF ATTORNEY                          | \$285       |
| <input type="checkbox"/> TRUST REVIEW  | \$375       |
| <input type="checkbox"/> MASTERLEDGER™ ANNUAL SUBSCRIPTION                   | \$95        |
| <input type="checkbox"/> DOCUMENT REPRINT                                    | \$75        |
| <input type="checkbox"/> OUT-OF-STATE ATTORNEY FEE                           | \$295       |
| <input type="checkbox"/> SINGLE HIPAA <input type="checkbox"/> MARRIED HIPAA | \$150/\$175 |
| <input type="checkbox"/> SPLIT DOLLAR AGREEMENT                              | \$2,500     |
| <input type="checkbox"/> TRUST DIVISION                                      | \$2,595     |
| <input type="checkbox"/> 706 ESTATE TAX RETURN                               | \$4,500     |
| <input type="checkbox"/> OTHER _____   | \$ _____    |

**ADVANCED PLANNING**

- |  |          |
|--|----------|
| <input type="checkbox"/> IRREVOCABLE INSURANCE TRUST | \$2,295  |
| <input type="checkbox"/> CORPORATION/LLC             | \$2,750  |
| <input type="checkbox"/> CHARITABLE REMAINDER TRUST  | \$4,500  |
| <input type="checkbox"/> FAMILY LIMITED PARTNERSHIPS | \$7,500  |
| <input type="checkbox"/> 501 (C)(3) (FOUNDATION)     | \$15,000 |

Trust document Signing Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Deposit Amount: \$ \_\_\_\_\_

Trust document Signing Time: \_\_\_\_\_

Total Price: \$ \_\_\_\_\_

Client's Name(s): \_\_\_\_\_, request(s) that Citadel Law Corporation complete the Comprehensive Estate Planning documents and services indicated above. The client(s) agree(s) to pay the **TOTAL PRICE**, as may be adjusted by the attorney, with a required **DEPOSIT**. If deposit amount is left blank, one-half of the total price will be charged as the deposit. The total price may vary depending on the actual work completed by the attorney. A rush fee of \$200 will apply if work required in less than 10 business days.

I understand that the Living Trust and other estate planning documents are not offered in connection with, or related in any way to, the purchase of any investments, financial products or services. The Living Trust is independent estate planning service provided by Citadel Law Corporation. I hereby declare that no investments or financial products or services were offered or proposed in connection with the preparation of my estate planning documents, and that the gathering of information was conducted in a professional manner for use by Citadel Law Corporation. I have read, understand and agree with all of the terms on the front and back of this form (*all clients must initial here*): \_\_\_\_\_.

I hereby authorize the use of my credit card for the deposit amount and any remaining balance upon completion of work. Credit Card Number: \_\_\_\_\_, Type: \_\_\_\_\_, Exp. Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

\_\_\_\_\_/\_\_\_\_/\_\_\_\_  
*Client* *Date*

\_\_\_\_\_/\_\_\_\_/\_\_\_\_  
*Client* *Date*

\_\_\_\_\_/\_\_\_\_/\_\_\_\_  
*CCEP Signature:* *Date*

\_\_\_\_\_/\_\_\_\_/\_\_\_\_  
*CCEP Print:* *Date*

\_\_\_\_\_  
*Attorney* *Date*

## **Citadel Law Corporation Disclosure Agreement**

**1. Citadel Law Corporation:** Citadel Law Corporation, (hereafter, "Citadel Law") is an independent estate planning law firm. Attorneys at Citadel Law counsel each client regarding all of the estate planning options which are appropriate for that client and the pros and cons of each option. Citadel Law' attorneys also design and draft each estate plan. Citadel Law recognizes that a living trust may or may not be an integral part of each client's estate plan and that not everyone should have a living trust. Citadel Law' attorneys are responsible for determining whether or not a client needs a living trust, which type of living trust, if any, would be most appropriate for the client, and which estate planning techniques should be used to best accomplish each client's objectives. Citadel Law does not rely on any particular client or firm for employment. For married couples, if the attorneys at Citadel determine that representing both spouses would constitute a conflict in interest, then Citadel may elect to represent only one spouse, and require that the other find independent legal counsel.

**2. Attorney Consultations and Telephonic Consultations:** Each client has the right to personally visit with and consult directly with an attorney at Citadel Law at any time concerning the creation or maintenance of their living trust or estate plan. Each client that establishes a living trust through Citadel Law may call, meet, or consult with an attorney at Citadel Law regarding any matter related to their living trust or estate plan at any time at no additional charge. Unless the client specifically requests an appointment to personally visit with an attorney, by signing this agreement the client hereby requests and authorizes an attorney at Citadel Law to telephone the client at his or her home or place of business for purposes of conveniently answering the client's questions, discussing relevant issues related to the client's estate plan, and gathering, providing and verifying information which the client, the attorney or the CCEP believes is important and necessary for the proper completion of the client's living trust and estate plan.

**3. Certified Citadel Estate Planner (CCEP) Participation:** A CCEP is a specially trained paralegal who has been instructed by and works under the supervision of the attorneys at Citadel. A CCEP does not engage in the practice of law, but does gather copies of grant deeds, tax bills, existing trusts or wills, tax returns, corporation, LLC or business records, insurance policies, retirement plans, or other family, business and financial data necessary for the proper completion of a client's estate plan. A CCEP may also discuss the general advantages of proper estate planning. The client hereby authorizes the CCEP to gather any information necessary for the proper completion of the estate plan. Each client has the right to meet personally with an attorney regarding any issue which affects his or her estate plan. However, unless the client specifically requests to meet with an attorney, the client hereby requests and authorizes the CCEP to deliver and notarize the living trust, grant deeds or other estate planning documents which have been prepared by the attorney.

**4. Disclosure and Use of Personal and Financial Client Information:** Citadel Law recognizes the importance of privacy and under the law of attorney-client privilege cannot disclose any of the client's personal or financial information to any person other than the Citadel attorneys or the client's CCEP paralegal. The client also authorizes the CCEP or Citadel Law to use the client's personal and/or financial information to prepare estate planning documents, presentations or illustrations for the client concerning the client's overall estate plan. Citadel Law will not disclose any confidential information to a client's family members or other third parties without the client's permission. Client agrees to provide Citadel Law and the CCEP with any information necessary for the proper completion of the estate plan and holds Citadel Law and the CCEP harmless for any damages that may result from the client's failure to accurately or completely provide such information. Client understands that it is client's responsibility to transfer assets into his or her living trust and hereby holds Citadel Law harmless for any damages relating to the client's failure to properly fund his or her trust.

**5. Authorization for Attorney Fees and Paralegal Fees:** The client understands that the total fee for a living trust includes the attorney's legal fee as well as established compensation for the paralegal. The client hereby requests and authorizes Citadel Law to pay a paralegal fee directly to the CCEP for the time, expense and effort that the CCEP expends in gathering or delivering information or documentation necessary to or prepared by the attorneys at Citadel Law for the completion of the client's living trust or estate plan. The client understands that the CCEP's paralegal fee may be construed as a conflict of interest, but by signing this agreement the client expressly authorizes the CCEP to receive compensation as a paralegal from Citadel Law.

**6. Free Document Review Period:** From the time a client's documents are signed and delivered the client has a 30-day period to request any changes or corrections at no charge. Document revisions after 30-days may require an amendment, and will be completed for a fee.