



## Estate Planning Packages

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Annual Package: \$1,250

Includes: Will, Trust, Tax Planning

### Trust-Based Estate Plan: \$1,000

For Married or Single, includes:

- Revocable Trust
- Certification of Trust
- General Transfer
- Power(s) of Attorney – Finances, Advance Health Care Directive(s)/Power of Attorney for Health Care
- HIPAA Release(s)
- Pour Over Will(s)

-This is also the price for a **restatement** of an existing trust-based estate plan that was not completed by EncorEstate Plans or Helios.

-For a married couple where each person would like their own trust, you will need to purchase two plans.

The pricing for trust-based estate plans is the same whether you are a single person, a married couple, or in a domestic partnership.

### Will-Based Estate Plan: \$500

For Married or Single, includes:

- Will(s)
- Power(s) of Attorney – Finances, Advance Health Care Directive(s)/Power(s) of Attorney for Health Care
- HIPAA Release(s).
- The pricing for will-based estate plans is the same whether you are a single person, a married couple, or in a domestic partnership.

### Powers Package: \$225

For One Person, includes:

- Power of Attorney – Finances, Advance Health Care Directives/Power of Attorney for Health Care
- HIPAA Release

### Estate Plan Amendments: \$250

To update documents initially completed by EncorEstate Plans or Helios only. Please note that if the estate plan was completed by any other entity, this option is not available - you will have to do a restatement of that estate plan.

### Estate Plan Summary: \$250

For Existing Trusts or Wills already completed outside of EncorEstate Plans or Helios, you get a Summary page that includes all of the client's previous decisions and provides questions to confirm whether those decisions are still correct.