

Trust Update Fee Policy

Regarding updating a trust agreement, our office has always maintained a policy of not charging existing clients for an occasional meeting to discuss your trust. These are typically handled with a schedule telephone conference.

However, if written changes are made to the trust documents, we charge a minimum one-hour consultation fee of \$350. This amount could be more depending on the documents changed.

The following information specifies what our policy is regarding all updates. Please review the following information carefully.

- No charge for a telephone conference to discuss funding or law changes, or to discuss changes in your family and the possible need to amend or rewrite all or part of your trust.
- \$350 for any type of written trust amendment. This includes the consultation and preparation, signing and notarization of the amendment.
- \$250 for updated Certificates of Trust, which are typically required for real estate transactions.
- Likewise, if new powers of attorney, health care directives or other documents are drafted, there will be a fee, which will be quoted in advance.

If you should have any questions concerning anything discussed in this notice, do not hesitate to contact our office.

Once again, we appreciate the opportunity to work with you on your estate planning.