

# REPRESENTATIVE PRICES FOR OUR PLANNING PROCESSES

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THE  
WRIGHT  
FIRM

## BASIC PLAN

*For the family or individual who...*

- is most concerned about the transfer of their assets after death and wants to guarantee that the right people will carry out their plan and take care of their children and their children's inheritances while they are minors.
- wants a simple plan that does not use testamentary trusts.
- is not concerned about the tax impacts of their estate planning.
- is not concerned about protecting their assets or their beneficiaries' inheritances from the claims of creditors, divorce, and the cost of long term care.

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*Your Basic Plan...*

- creates a simple will and utilizes beneficiary designations to provide for the administration and distribution of your assets after your death.
- names appropriate fiduciaries to carry out your estate plan including guardians for your children and minor beneficiaries.
- provides for the orderly transfer of your assets outright to your intended beneficiaries after your death.
- nominates appropriate surrogates for financial and health care decision-making if you are unable to make these decisions on your own.

*Per individual: \$1,800 – \$4,500\**

*Per couple: \$2,500 – \$5,000\**

## FOUNDATION PLAN

*For the family or individual who...*

- wants not only a smooth transfer of their financial assets and the naming of the right people to carry out their plan, but also wants their plan to provide after-death inheritance protection from taxes, creditors, and divorce for the financial assets that their beneficiaries will receive, and/or who.
- is concerned about the impact of federal and state taxes.
- wants to avoid public processes and provide for management of assets in the event of incapacity.

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*Your Foundation Plan...*

- provides everything included in the Basic Plan and additionally ensures that the assets left to beneficiaries are protected from their creditors and administered according to your wishes.
- utilizes all available estate tax exemptions to minimize the payment of federal and state estate taxes and to postpone the payment of any remaining such taxes until after the death of the surviving spouse.
- protects your children's right to inherit your assets in the event that your surviving spouse remarries.
- protects your beneficiaries' inheritances from estate and gift taxation at the times of their deaths to the maximum extent possible.
- retitles your financial assets to ensure your plan works.

*Per individual: \$3,500 – \$9,500\**

*Per couple: \$5,500 – \$10,500\**

## LIFETIME ASSET PRESERVATION PLAN

*For the family or individual who...*

- is most concerned about the protection of their assets from unforeseen creditors and nursing home during their lifetime.
- is concerned about the transfer of assets after death and wants to guarantee that the right people will carry out their plan and take care of their loved ones and their loved ones' inheritances, potentially for life.
- wants to avoid public processes and provide for management of assets in the event of incapacity.

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*Your Lifetime Plan...*

- develops and implements a plan that restructures your assets to maximize eligibility for Medicaid and other government beneficiaries.
- includes all of the benefits and protections of the Foundation Plan for incapacity and post-mortem distribution to your intended beneficiaries.
- can create an irrevocable trust that transfers your hard-earned assets to your intended beneficiaries according to your wishes.
- can include a meeting to explain the planning to family members so that they can understand the decisions made and better contribute to the plan's long term success.

*Per individual: \$5,500 – cost of two months in a nursing home\**

## FAMILY LEGACY PLAN

*For the family or individual who...*

- wants to identify their most important family values through in-depth counseling with their family attorney to create instructions and tools to perpetuate those values for their future generations.
- is concerned about the impact of federal and state death taxes.
- wants their plan to provide after-death inheritance protection from taxes, creditors, and divorce for the financial assets that their beneficiaries will receive.
- wants to put family members at ease by communicating in advance how and why the plan will work for the benefit of the current and future generations.

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*Your Legacy Plan...*

- provides everything included in the Foundation Plan.
- uses trusts to protect your assets from risks occurring during your lifetime.
- can include the development of specific extensive and detailed directives for the distribution and stewardship of your financial assets and family values.
- can include a meeting to explain the planning to the family members so they can understand the decisions made and better contribute to the plan's long term success.

*Per individual: \$7,500 – 20,000\**

*\*All fee ranges represent both design and design implementation fees but are additional to the charge for our first initial meeting*