

LIVING TRUST PACKAGE FEE AGREEMENT

The Law Office of Steven W. Allen, P.C., is employed to provide an Estate Plan Package which consists of the following:

1. Living Trust Document
2. Schedule of Trust Assets
3. Preparation of Deed to Transfer Real Estate (residence)
4. Assignment of Personal Property
5. Preparation of Letters to Transfer Bank Accounts, Investments, etc.
6. Affidavit of Trust
7. Instructions on How to Keep Your Trust Current
8. Back up "Pour-Over" Wills
9. Financial Durable Power of Attorney
10. Living Will and Medical Power of Attorney
11. Key Information for Successor Trustees
12. Advisor Lists
13. How to Settle an Estate
14. Glossary
15. How to Amend your Trust
16. Use and Care Booklet: How to transfer future entities (corporations, LLCs, etc.) into your Trust and maintain your complete estate portfolio
17. Notification of any changes in the law that would affect your estate plan

The Client agrees that the fee for these services is one payment of \$2,750.00

Select One: Full payment \$2,750 (save \$90 over the 2 payment plan) \$1,420 now / \$1,420 in 30 days
100% Satisfaction Guarantee. If you are for any reason not satisfied with the product or service provided, we will gladly give you a full refund.

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There are 3 ways to pay:

1. Send a check or money order payable to:

Steven W. Allen, P.C. (mail to 1550 E. McKellips Rd, Ste. 111, Mesa, AZ 85203)

2. Credit card payment (fax this completed form to 480-644-0072)

Card number _____ exp. date _____

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3. Online payment at www.EstatePlanningDr.com/livingtrust

Dated: _____

Signature: _____