

LAWRENCE P. HARTLAUB, P.C.

a Professional Corporation

HARTLAUB & BOYLE

ATTORNEYS AND COUNSELORS AT LAW

(Admitted to Practice in Colorado, Arizona & Illinois)

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FEES

(Wills, Trusts and Probate)

INITIAL CONFERENCE:

We will discuss your goals and needs, our experience, and what we can do for you. This meeting usually lasts for one hour. The charge for this meeting is \$100, which is waived if we are hired to do more work as described below. If you decide to hire us, we gather your personal information so that we can proceed with preparing your documents.

FLAT FEES:

Simple estate planning activities are charged at a flat rate, rather than hourly. We do this to provide the client with certainty about the final fee, and to encourage clients to contact us without worrying about paying more fees. Flat fees include expenses, except for court fees, recording costs, title insurance or other expenses paid to third parties, which are added to the flat fees. **NOTE:** These quoted flat fees include review of your current ownership papers (deeds, accounts, investments, insurance, retirement, etc) to be sure that the ownership and/or beneficiary designations are correct to carry out your estate planning goals.

WILLS (fee includes signed original and two copies (in presentation folders) of your Will, Health Care Power of Attorney (two extra copies for your medical providers), Statutory Durable General Power of Attorney (for finances), Advance Directive (Living Will), HIPAA Authorization, Burial Instructions, Disposition of Personal Property form, and letter summarizing your estate plan. We supervise signing and witnessing (no extra charge):

<u>Single person - Simple Will -</u>	\$750
with Trust for Children or Grandchildren -	add \$250
<u>Married couple - Simple Wills for each</u> – (total for both spouses)	\$1,000
a. with Trusts for Children or Grandchildren -	add \$250
b. with Disclaimer provisions (save or avoid estate taxes) -	add \$250

LIVING (REVOCAABLE) TRUSTS (documents include signed original and two copies (in presentation folders) of Trust Agreement, Pour-over Will, Health Care Power of Attorney, Statutory Durable General Power of Attorney (for finances), Advance Directive (Living Will), HIPAA Authorization, Burial Instructions, Certificate of Trust, Nominee Agreement, Trustee Certification of Investment Powers, Memorandum Disposition of Personal Property form, Statement of Authority for Real Estate, Bill of Sale for personal property to Trust, list of assets transferred to Trust, and letter summarizing your estate plan. Funding activities to transfers assets into your Trust are an extra charge (see below). We supervise the signing/witnessing of all documents (at no additional charge):

<u>Single Person - Simple Trust -</u>	\$1,750
a. with continuing Trust for Children or Grandchildren	add \$250
<u>Married Couple - Simple Trusts -</u>	\$2,250

- a. with continuing Trust for Children or Grandchildren - add \$350
- b. with Estate Tax savings provisions - add \$350

Funding activities (to transfer assets into your Trust):

- a. for each real estate deed (double deeds for both spouses considered a single deed) (includes recording costs) - \$275
- b. for each account (bank, investments, stocks, bonds) - \$120
- c. for each change of beneficiary (life insurance, retirement plans) - \$120

POWERS OF ATTORNEY (without doing a Will or Trust)

(one fee includes Health Care, Finances, Advance Directive and HIPAA)

- Single Person - \$350
- Married Couple - \$450

DECEDENT'S ESTATES:

- Affidavit for Collection of Personal Property - \$275
- Supplemental Affidavit for joint tenancy real estate - \$275
- Determination of Interests (for real estate) (Court fee, publication charges, and recording costs are extra) \$2,000
- Ancillary probate (for real estate – includes one deed from the Pers Rep) - (Court fees and recording costs are extra) \$1,500
- Deeds to convey real estate - \$275
- Probated estates - hourly rates
- Trust administration - hourly rates

FIDUCIARY:

When acting in a fiduciary capacity (trustee, agent, personal representative or executor), Larry charges reduced rates of \$175 per hour for himself, and \$100 per hour for his legal assistant. These reduced rates do not apply to providing legal advice or matters for which an attorney at law is needed.

HOME VISITS (homes, assisted living facilities and hospitals)

to meet with clients and/or sign papers - NO ADDITIONAL CHARGE

HOURLY RATES:

When charging hourly, we keep a record of all time devoted to you, and we bill at a preset hourly rate. The rates are: **Attorney - \$275.00; Legal Assistant - \$120.00** (subject to change if work continues for several months.)

Work is billed in segments of 10ths of an hour (six minutes is 1/10th hour) – no minimum charge. Even when we charge an hourly rate, certain types of work are charged a flat fee to reflect that an attorney may need to review what was done by the legal assistant, or as a result of the culmination of a long period of individual, unbilled activities for project matters or documents prepared in advance. Hourly fees are billed monthly. We do not bill for ordinary expenses such as postage, copies, telephone charges, or local mileage; but we do charge for out-of-pocket costs such as county recorder for deeds, overnight delivery, title insurance and other third party charges that we pay on your behalf.

PAYMENT OF FEES: One-half of the Flat Fee is due at the time you authorize us to prepare your estate planning papers (at the Initial Conference). The balance of the flat fee is due 60 days after delivery of the drafted papers to you for review, or when you sign the papers (whichever first occurs). Hourly fees, billable expenses and other charges are due monthly upon billing.

Please call to discuss any matters that are not described above.

(Until a client hires us, the above described fees may be revised from time to time – January 1, 2013.)