

Estate Planning Services and Pricing Guide



\$150

Basic Will Package

Individual

Due up front	\$225
Due at delivery	\$225
Total	\$450
Married	
Due up front	\$450
Due at delivery	\$450
Total	\$900

Package Includes:

- Last Will and Testament
- Financial Power of Attorney
- Healthcare Power of Attorney
- Cloud Storage and Sharing

Trust Package

Individual or Married

Total	\$1300
Due at delivery	\$650
Due up front	\$650

Additional Costs

Real Estate Retitling

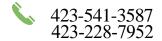
(Online service per property)

Package Includes:

- Revocable Living Trust
- Certification of Trust
- Pour-Over Wills
- Financial Power of Attorney
- Healthcare Power of Attorney
- Cloud Storage and Sharing

Estate Planning Steps

- 1. Appointment Prep: You will receive the Estate Planning Appointment Guide to complete, so you are prepared for the first appointment.
- 2. Data Input Appointment: We will ask you questions and guide you through creating the basis of your estate plan.
- **3.** Document Creation (2 weeks): Our attorney will review your estate needs and create the legal documents. Your estate planning package will be sent to our office to be reviewed, signed, and notarized during your follow up appointment. In unique situations, our attorney may need to follow up with you to ask clarifying questions.
- 4. Execution and Funding: We will work with you to make sure your estate plan is executed and funded.



1607 Hamill Rd Chattanooga, TN 37415 www.bighamwealthadvisory.com

<u>www.ancur.biz</u>

Advisory services are offered through a partnership with Bigham Wealth Advisory, an Investment Advisor in the State of Tennessee and ANCUR, Inc., Service Management with Insurance products and services offered through Bigham Insurance Advisory, an affiliated company.