Private Client Estate Planning

Sophisticated Planning. Personal Attention. Lasting Protection.

Our estate-planning services are designed for physicians, healthcare professionals, business owners, and families who value thoughtful advice, responsive service, and a plan tailored to their lives.

All packages include direct attorney counsel, secure electronic document storage, a professionally organized estate-planning portfolio, and digital copies of all executed documents. A signing ceremony with notarization is included at client's election.

Essential Will Plan

For clients who do not currently need a revocable living trust.

Individual — $1,750
Couple — $2,950

Includes:

- Last Will and Testament
- Durable Financial Power of Attorney
- California Advance Health Care Directive
- HIPAA Authorization
- Nomination of Guardian for Minor Children, if applicable
- Personal-property memorandum
- One attorney planning conference
- Attorney-led signing ceremony and notarization
- Secure digital copies of executed documents

This package does not provide probate avoidance.

Signature Living Trust Plan

For individuals and couples seeking probate avoidance, incapacity planning, and an organized transfer of assets.

Individual — $4,250

Couple — $6,500

Includes:

- Customized Revocable Living Trust
- Pour-Over Will for each client
- Certification of Trust
- Durable Financial Power of Attorney for each client
- California Advance Health Care Directive for each client
- HIPAA Authorization for each client
- Guardian nominations, if applicable
- General assignment of personal property
- Schedule of trust assets
- Personal-property memorandum
- Structured distributions for children or beneficiaries
- Preparation and recording coordination for one California deed
- Customized trust-funding instructions
- Beneficiary-designation review
- Comprehensive attorney review of drafts
- Attorney-led signing ceremony and notarization
- Premium estate-planning portfolio
- Secure digital vault containing executed documents
- Six-month funding follow-up

Ongoing annual reviews are available through the Annual Private Client Membership (see Ongoing Legacy Counsel).

County recording charges and other third-party expenses are billed separately.

Legacy Protection Trust Plan

For physicians, business owners, blended families, clients with substantial retirement assets, and families seeking enhanced inheritance protection.

Individual — starting at $6,250
Couple — starting at $8,750

Includes everything in the Signature Living Trust Plan, plus appropriate customized provisions for:

- Lifetime beneficiary trusts
- Inheritance protection from creditors and divorce
- Blended-family planning
- Separate and community-property coordination
- Retirement-account planning
- Business-interest succession provisions
- Special distribution standards
- Trust protector provisions
- Beneficiaries requiring financial oversight
- Multiple real properties
- Coordination with the client's CPA, financial adviser, and insurance professionals

Ongoing annual reviews are available through the Annual Private Client Membership (see Ongoing Legacy Counsel).

Final pricing is confirmed following the initial planning conference.

Physician & Business Owner Legacy Plan

For professionals whose estate plan must coordinate with a medical practice, professional corporation, partnership, LLC, real-estate holdings, or other closely held business interests.

Individual — starting at $8,500

Couple — starting at $11,500

Includes everything in the Legacy Protection Trust Plan, plus:

- Review of governing documents for up to two business entities
- Assignment of eligible business interests to the trust
- Business succession planning conference
- Coordination of ownership, beneficiary designations, and incapacity provisions
- Review of buy-sell and ownership-transfer provisions
- Key-person and life-insurance coordination
- Digital asset and professional-practice continuity planning
- Written succession and implementation recommendations
- Conference with the client's CPA or financial adviser
- Priority scheduling

Ongoing annual reviews are available through the Annual Private Client Membership (see Ongoing Legacy Counsel).

Business restructuring, tax opinions, buy-sell agreements, and preparation or amendment of entity-governance documents are quoted separately.

Advanced Wealth-Transfer & Asset-Protection Planning

For clients engaging in gift, estate-tax, and asset-protection strategies involving irrevocable trusts. These engagements assume sophisticated attorney-led planning for wealthy clients—not a document-only service.

West Coast Health Law Advanced Planning Menu

- **Irrevocable Legacy Trust —** starting at $15,000
- **Spousal Lifetime Access Trust (SLAT) —** starting at $18,500
- **Coordinated SLAT Planning for Both Spouses —** starting at $37,500
- **Irrevocable Life Insurance Trust (ILIT) —** starting at $8,500
- **Advanced ILIT with Policy and Estate-Liquidity Planning —** starting at $12,500
- **Annual ILIT Administration —** starting at $2,500 per year
- **Irrevocable Trust Review and Strategy Conference —** $3,500
- **Irrevocable Trust Modification, Decanting, or Judicial Reformation —** starting at $7,500

The base fee includes strategy, drafting, implementation instructions, coordination with the client's CPA and financial adviser, and a post-funding review. It does not automatically include valuations, tax returns, litigation, court proceedings, entity restructuring, or professional trustee fees.

Common Additional Expenses

Advanced trust clients may also incur:

- Gift-tax return preparation: approximately $2,500–$7,500+
- Business-interest or real-estate appraisal: approximately $3,500–$15,000+ per asset
- Entity recapitalization or restructuring: approximately $5,000–$20,000+
- Deeds and recording charges: approximately $650–$1,500 per property
- Professional trustee or ILIT administration: commonly $2,500+ annually
- Ongoing income-tax return preparation for a nongrantor trust
- Investment, insurance, and financial-advisory charges

For high-net-worth engagements, final pricing is determined after reviewing the client's balance sheet, existing estate plan, asset basis, insurance, business interests, prior taxable gifts, and expected funding transaction.

Optional Add-On Services

Add-on provisions below apply to the Essential Will and Signature Living Trust plans; where relevant, they are already incorporated in the Legacy Protection and Physician & Business Owner plans. Third-party Special Needs Trust drafting is billed separately at every plan level.

Trust Enhancements

- Special Needs Trust provisions: $1,500 per beneficiary
- Lifetime/Dynasty Trust provisions: $1,250 per beneficiary
- Blended-family or QTIP planning: $2,000–$3,500
- Pet Trust: $750
- Retirement-account conduit or accumulation trust: $1,500
- Trust protector provisions: $750
- Residence-occupancy or life-estate provisions: $950
- Charitable-gift provisions: starting at $750
- Customized beneficiary incentive provisions: starting at $750
- Irrevocable trust planning: see Advanced Wealth-Transfer & Asset-Protection Planning

Real Estate and Business Interests

- Additional California trust-transfer deed: $650 per property
- Out-of-state deed coordination: $750 plus local counsel's fees
- Assignment of LLC, partnership, or corporate interest: $650 per entity
- Business succession memorandum: starting at $1,500
- Buy-sell agreement: starting at $3,500
- Entity formation or restructuring: quoted separately
- Family LLC planning: starting at $5,500

Recording charges, transfer taxes, title-company charges, and outside counsel's fees are additional.

Existing Plan Reviews and Updates

- Estate-plan review and recommendations: $750 individual | $1,100 couple
- Trust amendment: starting at $1,250
- Complete trust restatement: starting at $3,750 individual | $5,500 couple
- Replacement financial and healthcare documents: $850 individual | $1,500 couple
- Emergency or expedited service: 25% premium
- Home, hospital, or private-location signing within San Diego County: starting at $750

Family and Young-Adult Planning

Young Adult Protection Plan — $850

Includes:

- Durable Financial Power of Attorney
- Advance Health Care Directive
- HIPAA Authorization
- FERPA Authorization
- Digital asset authorization
- Attorney consultation and signing ceremony

Additional child completed at the same time: $650

Ongoing Legacy Counsel

Annual Private Client Membership

$1,500 per family, per year

Available to clients who have completed a trust plan with the firm.

Includes:

- Annual estate-plan review
- One annual attorney strategy meeting
- Review of life and asset changes
- Trust-funding checkup
- Beneficiary-designation review
- Up to one hour of attorney consultation during the year
- Priority scheduling
- 10% preferred-client pricing on amendments and restatements
- Family meeting following incapacity or death, when appropriate

Unused attorney time does not carry forward. New documents and substantial revisions are billed separately.

Our Planning Process

1. Private planning consultation
2. Personalized legal and family analysis
3. Attorney-guided design meeting
4. Custom preparation and attorney review
5. Dedicated signing ceremony
6. Trust-funding guidance and follow-up
7. Continuing plan maintenance

*A $750 planning fee is collected when the initial attorney design meeting is scheduled. The fee is credited toward any comprehensive estate-planning package retained within 30 days.

***Flat fees cover the services expressly included in the selected package. Complex tax planning, contested matters, international assets, unusual title issues, and services outside the agreed scope require a separate written engagement.*