Your will and trust packages

Documents usually arrive within 5 business days. Joint means a married couple or domestic partners.

Trust-Based Package

What you put in the trust passes to your family without probate court, and your plan stays private.

$1,775	$2,775
SINGLE	JOINT

For a couple, one joint trust for the two of you. Want a separate trust for each of you? The second trust is $400 off.

1. **Revocable Living Trust**
   The heart of the plan. It names who manages things, who receives what, and when. It comes with a list of your assets and your personal belongings.
2. **Pour Over Will**
   Moves anything left outside the trust into it, and names the guardian for your minor children.
3. **Certification of Trust**
   A short page that shows a bank your trust exists and who may act for it.
4. **General Transfer**
   Moves the things you meant to put in the trust into it, without retitling each one.
5. **Property Agreement**
   For married couples in community property states only. Sorts what you own together from what each of you owns.
6. **Power of Attorney for Finances**
   Names who handles your money if you cannot.
7. **Health Care Directive and Power of Attorney**
   Names who makes medical decisions for you, and records your wishes on life support, organ donation and your funeral.
8. **HIPAA Release**
   Lets the people you name see your health records.

Will-Based Package

The essentials: who gets what, who raises your children, and who speaks for you if you cannot.

$875	$1,750
SINGLE	JOINT

For a couple, each of you gets your own set.

1. **Last Will and Testament**
   Names who receives what, and the guardian for your minor children.
2. **Power of Attorney for Finances**
   Names who handles your money if you cannot.
3. **Health Care Directive and Power of Attorney**
   Names who makes medical decisions for you, and records your wishes.
4. **HIPAA Release**
   Lets the people you name see your health records.

One round of changes within 90 days is included with every package. The add-ons and their prices are on the next page.

GOOD TO KNOW

- Wealth Builders Insurance Agency is not a law firm, and nothing we say is legal or tax advice.
- Your documents are prepared by our document partner, customized to your family and the law of your state, then reviewed by certified estate planners and paralegals.
- An attorney review of your plan is available in most of the states we serve, for an added fee.
- For a legal or tax question about your situation, speak with an attorney or a tax professional.
- An estate plan is not insurance. Its price is separate from any policy, and a consulting credit never goes toward a policy.

Start with a free conversation.

Had a paid consulting hour with us in the last 30 days? The full $250 counts toward your package.

Call or text (980) 304-1500
wealthbuilders-insurance.com/go/estate

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We are not a law firm and do not give legal advice. Your documents are customized to you and reviewed by certified estate planners and paralegals. An attorney review is available in most states.

Add-ons, as you choose them

Your flat fee is your package plus any add-ons you select. Every price is here, before you sign.

Move your home into the trust (deed preparation and recording) Recording fees included. In North Carolina, we file it in person at the Register of Deeds in the county where the home is. Not available in Hawaii, Louisiana or Massachusetts.	**$695** per property
Move a business into the trust (business assignment)	**$250** per business
Powers Package for one adult (powers of attorney, health care directive, HIPAA release; no will or trust) Often the first plan at 18.	**$295**
Summary of an estate plan you already have, made elsewhere Usually within 10 business days.	**$350**
Rush: documents in 3 business days	**$195**
Rush: documents in 1 business day Plan submitted before 5 PM Eastern.	**$395**
Change order, after the round of changes included in your first 90 days	**$250** each
Amendment to a plan made through us	**$350**
Estate plan binder	**$295**
Binder and a mobile notary at your signing: will-based or powers plan	**$595**
Binder and a mobile notary at your signing: trust-based plan	**$750**
State-specific attorney review letter, where available Not yet available in South Carolina or New Jersey.	**$200**
Attorney review letter and a half-hour video call with the attorney, where available Not yet available in South Carolina or New Jersey.	**$500**

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