

ASSET PROTECTION & ESTATE PLAN PRICING

[NOTE: All pricing below is strictly illustrative based on the "TOTAL PRICE" for cost breakdown disclosure.

Pricing varies on complexity of work, number of deeds, urgency of time, etc.

Document Type	Internal Processing Costs	Advisor's Compensation	Document Preparation Fees	Accountant's Review	Attorney's Review	TOTAL PRICE
Complex Business Trust	\$400	\$800	\$600 *	\$200	\$500	\$2,500
Family Limited Partnerships	\$400	\$800	\$600 *	\$200	\$500	\$2,500
Charitable Remainder Trusts	\$400	\$800	\$600 *	\$200	\$500	\$2,500
Revocable Living Trusts	\$200	\$500	\$400 *	\$100	\$300	\$1,500
Life Insurance Trust	\$200	\$500	\$400 *	\$100	\$300	\$1,500
Price of Complete Model *	\$2,600	\$5,300	\$4,000 *	\$1,300	\$3,300	\$16,500
Financial, Estate & Tax Analysis	\$300	Any charge above \$500 base price.		\$200 (could be more based on the complexity)		\$500 (minimum)

* **The Complete Model** includes four (4) Limited Partnerships [business or family], two (2) Complex Business Trusts, and one (1) Living Trust.

* **Each entity is entitled** to two (2) free property plus one (1) homestead deeds. Each additional deed prepared is \$30.00 each. The cost is added to the fees of the Document Preparation Fees.

◆ When conducting joint case work, we split the Advisors Compensation 50/50, along with any investments or insurance that come the case in question. This equals \$500 dollars per business entity. In our complete model this equates to \$3,300 per client on joint cases for the Advisor.

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◆ Two checks will be collected from the client per entity; (1) one check for \$500 to the reviewing attorney, and (2) one for \$2,000 balance payable to The Baldwin Trust Group.

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For example: The Complete Model portfolio consisting of four (4) LP's, two (2) Complex Trusts, and one (1) Living Trust . . . one check for \$3,300 payable to the reviewing attorney and one check for \$13,200 payable to The Baldwin Trust Group.