

**LAW OFFICE OF KEITH R MILES, LLC**  
**2020 PRICE SCHEDULE**

---

**ELDER LAW LEVEL I: FOUNDATIONAL PLANNING**

**\$2,000**

**Level I will include the following:**

- Power of Attorney – Uniform POA form supplemented with Customized Special Instructions
- Power of Attorney – Custom Planning for General Powers including Special Instructions coordination
- Power of Attorney – Custom Planning of Specific Powers for Gifting and Trust Creation
- Power of Attorney – Custom Planning of Specific Powers for Beneficiary Designations, Waivers and Disclaimers
- Advance Directive for Health Care – Assistance with selection of Health Care Agents
- Advance Directive for Health Care – Assistance with selection of Treatment Preferences (“Living Will”)
- Advance Directive for Health Care – Coverage of Final Disposition of Body/Organ Donation/Autopsy
- HIPAA Release – Allowing Communication for Select Individuals and Access to Medical Records
- Will – Planning of Guardians for Minor Children
- Will – Testamentary Trust Planning for Government Benefits Preservation for a Spouse
- Will – Testamentary Trust Planning for Children, other family members, friends and organizations
- Revocable Trust – Testamentary Planning for Children, other family members, friends and organizations (where no Government Benefits planning is needed)

---

**ELDER LAW LEVEL II: SPECIAL NEEDS TRUST PLANNING**

**\$5,000**

**Level II will include everything above in **Level I** plus the following:**

- Special Needs Trust – First Party Trust for those under age 65 to preserve Government Benefits with Payback provision to Medicaid
- Supplemental Needs Trust – Third Party Trust for those of all ages to preserve Government Benefits without a Payback provision to Medicaid
- Special Needs Trust – First Party Pooled Trust for those under age 65 to preserve Government Benefits. May include provision to retain remainder in the Pooled Trust. (optional where needed)
- Supplemental Needs Trust – Third Party Pooled Trust for those of all ages to preserve Government Benefits without a Payback provision to Medicaid. May include provision to retain remainder in the Pooled Trust. (optional where needed)
- ABLE Account – Account Creation (where eligible) and Coordination with Special Needs Trusts

---

**ELDER LAW LEVEL III: LONG-TERM CARE PLANNING** **\$8,000**

**Level III will include everything above in **Levels I and II** plus the following:**

- Medicaid Planning – Review of Income and Assets for Medicaid Program Classification and Qualification
- Medicaid Planning – Review of Bank Accounts, Deeds and other Transactions for Transfers
- Medicaid Planning – Assistance with Submission of Medicaid Application to County Office
- Medicaid Planning – Explore Advance Planning with Medicaid Asset Protection Trusts (where available)
- Veterans Pension Planning – Review of Income and Assets for Aid & Attendance Program Classification and Qualification
- Veterans Pension Planning – Review of Bank Accounts, Deeds and other Transactions for Transfers
- Veterans Pension Planning – Explore Advance Planning with Veterans Asset Protection Trusts (where available)
- Long-Term Care Planning – Review and/or Recommendations of Life Insurance, Annuities and Long-Term Care Insurance to fund Long-Term Care Planning (may involve referral to Insurance professional)

**LAW OFFICE OF KEITH R MILES, LLC**  
**2020 PRICE SCHEDULE**

---

**ESTATE PLANNING LEVEL I: FUNDAMENTALS PACKAGE** **\$2,000**

**Level I will include the following:**

- Power of Attorney – Uniform POA form supplemented with Customized Special Instructions
- Power of Attorney – Custom Planning for General Powers including Special Instructions coordination
- Power of Attorney – Custom Planning of Specific Powers for Gifting and Trust Creation
- Power of Attorney – Custom Planning of Specific Powers for Beneficiary Designations, Waivers and Disclaimers
- Advance Directive for Health Care – Assistance with selection of Health Care Agents
- Advance Directive for Health Care – Assistance with selection of Treatment Preferences (“Living Will”)
- Advance Directive for Health Care – Coverage of Final Disposition of Body/Organ Donation/Autopsy
- HIPAA Release – Allowing Communication for Select Individuals and Access to Medical Records
- Will – Planning of Guardians for Minor Children
- Will – Testamentary Trust Planning for Government Benefits Preservation for a Spouse
- Will – Testamentary Trust Planning for Children, other family members, friends and organizations
- Revocable Trust – Testamentary Planning for Children, other family members, friends and organizations (where no Government Benefits planning is needed)

---

**ESTATE PLANNING LEVEL II: TAX PLANNING** **\$5,000-\$10,000**

**Level II will include everything above in Level I plus the following:**

- Tax Planning – Income, Estate, Gift and GST Tax Analysis
- Tax Planning –Bypass/Credit Shelter Trust – Will or Revocable Trust
- Tax Planning –Qualified Terminable Interest Trust (QTIP) – Will or Revocable Trust
- Tax Planning - Grantor Retained Annuity Trust (“GRAT’s”)
- Tax Planning - Intentionally Defective Grantor Trust (“IDGT”)
- Tax Planning - Charitable Remainder Trusts (“CRAT’s” and “CRUT’s”)
- Tax Planning - Life Insurance Trusts (“ILIT’s”)
- Insurance Planning – Review and/or Recommendations of Life Insurance and Annuities (may involve referral to Insurance professional)

---

**ESTATE PLANNING LEVEL III: ASSET PROTECTION PLANNING** **\$10,000+**

**Level III will include everything above in Levels I and II plus the following:**

- Asset Protection – Family Limited Liability Company or Family Limited Partnership
- Asset Protection – Domestic Limited Liability Companies (Wyoming, Nevada, Delaware)
- Asset Protection – Offshore Limited Liability Companies (Nevis)
- Asset Protection – Domestic Asset Protection Trusts (Nevada, South Dakota, Alaska, Tennessee)
- Asset Protection – Offshore Limited Liability Companies (Cook Islands, Nevis)
- Asset Protection – Planning for Real Estate
- Asset Protection – Corporations, Limited Liability Companies, Limited Partnerships and Trusts