

LAW OFFICE OF KEITH R MILES, LLC
PRICE SCHEDULE (EFFECTIVE AUGUST 21, 2020)

FLAT FEE SERVICES

FOUNDATIONAL PLANNING

WILL BASED: \$1,500 Individual/\$2,500 Couple

TRUST BASED: \$3,000 Individual/\$5,000 Couple

- 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)

SPECIAL NEEDS COUNSELING/PLANNING

\$5,000 Individual/\$7,000 Couple

Will include everything in Foundational Planning 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

LAW OFFICE OF KEITH R MILES, LLC
PRICE SCHEDULE (EFFECTIVE AUGUST 21, 2020)

PUBLIC BENEFITS ADVICE/PLANNING

\$8,000 Individual/\$10,000 Couple

Will include everything in Foundational Planning and Special Needs Counseling/Planning 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)
- 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 agent)

TAX PLANNING

\$5,000-\$10,000 per Individual

Will include everything in Foundational Planning 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)

ASSET PROTECTION PLANNING

\$10,000+ per Individual

Will include everything in Foundational Planning and Tax Planning plus the following:

- Asset Protection – Family LLC or Family LP
- Asset Protection – Domestic LLCs (Wyoming, Nevada, Delaware)
- Asset Protection – Offshore LLCs (Nevis)
- Asset Protection – Domestic Asset Protection Trusts (Nevada, South Dakota, Alaska, Tennessee)
- Asset Protection – Offshore Asset Protection Trusts (Cook Islands, Nevis)
- Asset Protection – Corporations, Limited Liability Companies, Limited Partnerships and Trusts Mix

HOURLY FEE SERVICES (PLUS RETAINER)

1. **Health and Personal Care Planning:** including giving advice regarding, and preparing, advance medical directives (medical powers of attorney, living wills, and health care declarations) and counseling older persons, individuals with supplemental/special needs, attorneys-in-fact, and families about life care, medical and life-sustaining choices, and related personal life choices.
2. **Fiduciary Representation:** including seeking the appointment of, giving advice to, representing, or serving as executor, personal representative, attorney-in-fact, trustee, guardian, conservator, representative payee, or other formal or informal fiduciary.
3. **Legal Capacity Counseling:** including advising how capacity is determined and the level of capacity required for various legal activities and representing those who are or may be the subject of guardianship/conservatorship proceedings or other protective arrangements.
4. **Advice on Insurance Matters:** including analyzing and explaining the types of insurance available, such as health, life, long term care, home care, COBRA, Medigap, long term disability, dread disease, prescription coverage, and burial/funeral policies.
5. **Resident Rights Advocacy:** including advising patients and residents of hospitals, nursing facilities, continuing care retirement communities, assisted living facilities, adult care facilities, and those cared for in their homes of their rights and appropriate remedies in matters such as admission, transfer and discharge policies, quality of care, and related issues.
6. **Housing Counseling:** including reviewing the alternatives available and their financing such as: renovation loan programs, life care contracts, home equity conversion, reverse and other mortgage options.
7. **Employment and Retirement Advice:** including pensions, retiree health benefits, unemployment benefits, and other benefits.
8. **Disability and Elderly Discrimination:** Counseling with regard to age and/or disability discrimination in employment, housing and related areas.
9. **Litigation and Administrative Advocacy:** including will contests, contested capacity issues, elder abuse (including financial or consumer fraud), fiduciary administration, public benefits, nursing home torts, and discrimination.