



## The True Savings of an Estate Plan

\$450,000 Estate Consisting of...

A Car, 401(K), Bank Account, Stocks, Family Heirlooms,  
 Rental/Vacation Home, Business Interest, and a Boat

Suzy Smart- Created an Estate Plan with Yonas & Phillabaum.	Jane Doe – Has no Estate Plan but has a will from the internet.
Upfront Cost: <b><u>\$1,125-\$5,600</u></b>	Upfront Cost: <b><u>\$200</u></b>
Upon Death, Transfer Fees (if applicable): <b><u>\$250-\$500</u></b>	Upon Death, Initiate Probate: <b><u>\$260</u></b>
Car or Boat Transfer on Death Designation: <b>FREE<sup>1</sup></b>	Did Not Complete
401(K) Transfer on Death Designation: <b>FREE</b>	Did Not Complete
If Beneficiary is under 18, Create a Trust <sup>2</sup> : <b>\$3,000</b>	
House: Survivorship Deed <i>OR</i> Transfer on Death Affidavit: <b>\$225</b>	Did Not Complete
Place House in Trust <sup>3</sup> : <b>FREE</b>	Court-Mandated Appraisal <b>\$500</b>
Transfer on Death Designations <i>OR</i> Place in Trust <sup>4</sup> : Bank Accounts: <b>FREE</b> Stocks: <b>FREE</b> Retirement Accounts: <b>FREE</b>	Did Not Complete Executor/Administrator Fee <b>\$14,000</b> Executor/Administrator Bond <b>\$1,600</b>

1 BMV costs may apply.

2 Revocable Trust cost starts at \$3,000. Costs may be higher based on complexity of trust.

3 Free if Trust was already created. If not, See Footnote 2.

4 Contact account administrator or financial institution. Free if Trust was already created. If not, See Footnote 2.

Will (Transfer Family Heirlooms):	<b>\$400</b>	Probate Attorney Fees Heirs Cooperate	<b>\$16,500</b>
<i>OR</i> Include in Trust:	<b>FREE</b>	Heirs Do Not Cooperate (Additional \$10,000)	<b>\$26,500</b>
LLC <sup>5</sup> Transfer on Death Designation:	<b>\$750</b>	Did Not Complete	
<i>OR</i> Include in Trust <sup>6</sup> :	<b>FREE</b>		
Rental / VH: Survivorship Deed <i>OR</i> Transfer on Death Affidavit:	<b>\$225</b>	Did Not Complete	
Place Rental / VH in Trust <sup>7</sup> :	<b>FREE</b>		
Powers of Attorney & Living Will:	<b>\$500 - \$1,000</b>	Did Not Complete	
Taxes and Creditor Claims:	<b>NONE</b>	Taxes and Creditor Claims:	<b>LIKELY</b>
<b>Cost to Probate:</b>	<b>\$0</b>	<b>Cost to Probate:</b>	<b>\$31,660 - \$43,160</b>
<b>Debts / Missed Payments:</b>	<b>NONE</b>	<b>Debts / Missed Payments:</b>	<b>2-6 Mo.</b>
<b>Time after Death to Transfer Assets to Heirs:</b>	<b>2-4 Wks<sup>8</sup></b>	<b>Time after Death to Transfer Assets to Heirs:</b>	<b>6-18 Mo.</b>
Prior to Death Cost:	<b>\$1,125-\$5,600</b>	Prior to Death Cost:	<b>\$0-\$200</b>
Upon Death Cost:	<b>\$0-\$500</b>	Upon Death Cost:	<b>\$31,560 - \$43,060</b>
<b><u>Total:</u></b>	<b><u>\$1,125-\$5,600</u></b>	<b><u>Total:</u></b>	<b><u>\$31,560 - \$43,060</u></b>

5 OR other small business.

6 Free if Trust was already created. If not, See Footnote 2.

7 Free if Trust was already created. If not, See Footnote 2.

8 Once the Death Certificate is created, heirs may process transfers.