CORNERSTONE LEGAL PLLC

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Funding Rates

I strongly recommend that the foundation of your Estate Plan is funded to fully accomplish your planning goals. While you cannot make certain funding changes if you have a Will, you still have many options that will avoid Probate Administration. Your Estate Plan flat-rate fee includes dedicated time during our planning session to review your assets, an asset summary for your Estate Plan portfolio, and funding instructions as a resource for you to use now or in the future.

For each funding change listed below, the additional flat-rate charge includes all of the following steps:

- Research to obtain the correct form(s) and/or communication with your financial advisor
- Preparation of the form(s)
- Review and signing of the form(s) with you
- Copying the forms for my file and your Estate Plan portfolio
- Mailing the form to the financial institution/recorder's office/SOS
- All necessary follow up with you to ensure the change has been made

I firmly believe in providing the best possible funding services for my clients using the wealth of knowledge and experience that I've gained over the last 15 years. However, I don't believe that these funding changes should feel financially burdensome or deter you from investing in a high-quality, fully funded Estate Plan. Many funding changes can easily be completed by working with your Financial Advisor. My involvement can be minimal in this type of situation, and I take pride in maintaining the strength of my professional relationships with your advisors.

The flat rates listed below are developed based upon the average time it takes to complete the steps listed above, charged at a typical "Paralegal" hourly rate of $100 instead of my hourly attorney rate of $225.

Cash Accounts (checking, savings, certificates of deposit)	
• TOD/POD/beneficiary designation • Change of ownership	$50 $75
Savings Bonds (all bonds)	
• Change ownership of Treasury Direct and add bonds • Establish Treasury Direct account and change ownership	$75 $100

Investment Accounts (investment/brokerage accounts, stock/trading accounts, profit sharing accounts)	
• Change of ownership – assist Financial Advisor • TOD/POD/beneficiary designation • Change of ownership	$25 $50 $75
Retirement Accounts (401k, 403b, 457, Roth, SIMPLE)	
• Change of beneficiary – assist Financial Advisor • Change of beneficiary – online • Change of beneficiary – paper	$25 $50 $75
Life Insurance (term, whole life, accidental death, employer sponsored)	
• Change of beneficiary – online • Change of beneficiary – paper	$25 $50
Real Property (residential property, commercial property, condos, timeshares)	
• New deed and Property Transfer Affidavit (each) • Change of ownership for timeshare	$150 $75-$150
Business Interests (sole proprietorships, partnerships, LLCs, Corporations)	
• Change of membership/stock certificate and/or amend Operating Agreement	$50
Certificate of Title assets (high value vintage cars, recreational vehicles, RVs, campers, watercraft)	
• Change of title	$25