

## Introduction

Dear Client,

Our office specializes in the preparation of Living Trusts and related documents. We offer our services at conveniently low prices due to our specialization.

Although our prices are low, our level of service is high and we always strive to provide every client with the best quality of legal services. Thus, our clients' word-of-mouth referrals are achieved by our excellent service.

At our office, we treat our clients with dignity and respect their needs. Our goal is to make the process of establishing a Living Trust a convenient and pleasant experience.

Sincerely yours,  
Allan M. Soto, Esq.

## Why make a Living Trust?

1. Avoid Costly Probate Administration Fees.
2. A Will alone will not avoid Probate.
3. Make sure your assets pass quickly and inexpensively to your heirs.
4. You can change the terms of your trust or revoke the trust.
5. Living Trusts give you control to decide the distribution of your assets.
6. Peace of Mind.

## Protect Your Future

Today, many people within the middle class face probate issues and estate tax issues. Therefore, Living Trusts which were once thought to be for the rich are now being used by "Middle America."

Living Trusts are beneficial for the following reasons:

1. They protect your family from costly probate and administrative fees.
2. No court process is necessary.
3. Living Trusts can help reduce estate taxes.
4. They insure that your assets pass more quickly and inexpensively to your heirs.
5. They keep your family's financial affairs out of the public eye.
6. Living Trusts enable you to exercise considerable control over how your assets are used and cared for after you are gone.

Living Trusts have a multitude of benefits but most of all, Living Trusts provide you with a "peace of mind" for your financial future.

### PROBATE FEES:

**Avoid the following  
state authorized fees for  
Attorneys & Executors during  
Probate Administration:**

**4% of first \$100,000**

**3% of next \$100,000**

**2% of next \$800,000**

**1% of next \$9,000,000**

**\*\*This does not include extraordinary fees\*\***

## How does a Living Trust work?

A Living Trust is like making a gift through a contract. Think of a Living Trust as a big giftbox. The giftbox in legal terms is called the **Trust Estate**. Three parties are needed to establish, manage, and receive the contents of the "giftbox" or **Trust Estate**.

First, a **Settlor** is needed because he or she is the person who establishes the Trust by placing a gift of money or property into the giftbox.

Second, a **Trustee** is chosen to manage the gift. The **Settlor** and the **Trustee** are usually the same person.

Third, a **Beneficiary** is the person who receives the gift.

Typically, a Living Trust consists of Parents establishing a Trust as the **Settlers**, the Parents also act as the **Trustees**, and the children are the **Beneficiaries**. The main asset people place in their trust is their home because they have accumulated a lot of equity or they have paid off their mortgage.

In California, any estate with assets worth \$150,000 dollars or more must endure a formal Probate administrative process and therefore, to avoid Probate Fees, among the first assets placed into a Living Trust are usually people's home. Additionally, other assets, whether located within California or in another state, are placed into a Living Trust to avoid being otherwise subject to Probate.

Assets that are not placed into a Living Trust may be subject to Probate. A common mistake is to not transfer assets into a Living Trust (**See the schedule of Probate Fees**) in the correct manner.

## Services Included

**Individual \$499\***  
**Married \$699\***

\*Plus recording fees \$50.00 each deed. First time clients. Simple estates.

1. Two (2) Appointments with the Attorney to **create the Trust**;
2. Living Trust Agreement;
3. Pour-Over Will;
4. Advance Health Care Directive;
5. Statutory Power of Attorney for Finances;
6. Summary of Trust Agreement;
7. Instructions to Place Other Assets Into Your Trust;
8. Assignment of Personal Property Form; and
9. Successor Trustee Letter of Instructions.

## Other Services

1. A/B Provision Incorporated into the Living Trust.....\$250.00
2. Special Needs Trust.....\$250.00
3. Complex Trusts, Extra Sessions or Contract Not To Amend Trust .....\$250.00
4. Basic Amendments to Living Trust .....\$175.00
5. Consultation Fee for legal advice (1Hour) appointment.....\$175.00
6. Each Power of Attorney Document or Will.....\$75.00\*
7. Transfer of Additional CA Properties/Deeds into Trust.....\$175.00\*
8. Other States Deeds into Trust .....\$200.00\*
9. Transfer of other Assets to Trust .....\$175.00\*
10. Each County Tax Assessor's Form .....\$50.00\*

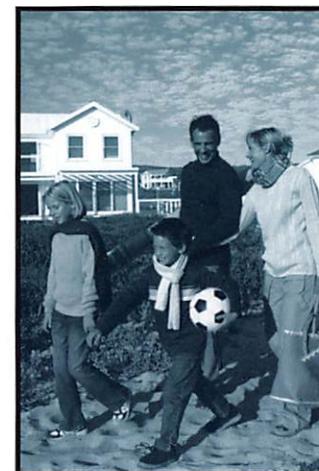
**\*Recording fees are added to the preparation of deed.**  
**\*\*All fees are subject to change without notice.**

## What to bring to the first appointment?

1. We request that you bring the deed(s) to your real estate and the corresponding tax bill(s) to each piece of property.
2. Bring a list of your family's names, addresses, telephone numbers, birthdates and the same for any other beneficiaries.
3. Make a simple list of your biggest assets.

Welcome to the

*Law Offices of*  
**ALLAN M. SOTO, Inc.**



## Living Trusts Probate Business Law

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