



## ESTATE PLANNING FEE SCHEDULE

	INDIVIDUAL	COUPLE		
<b>Simple Will*</b>	\$350	\$615		
Straightforward will				
❖ Basic, direct gifts to family members	*\$315	*\$553.50		
❖ Modest assets, simple affairs and few beneficiaries				
<b>Custom Will</b>	\$550	\$965		
Customised will				
❖ More complicated or numerous gifts				
❖ Clients who want a 'simple' will but have complex lives (such as blended families, business owners, etc)				
❖ Unusual or custom provisions or wishes				
❖ Life estate				
<b>Testamentary Trust</b>	\$990	\$1485		
Complex will				
❖ One or more testamentary discretionary trusts				
❖ Trust for vulnerable beneficiaries				
❖ Review of 'non-estate' asset structures (family trusts, SMSF etc)				
Very complex TT Wills: priced from \$2200				
<b>Basic Will Update/Amendment*</b>	\$200	\$350		
❖ Very simple change to existing will	*\$180	*\$315		
❖ Only available to existing clients				
<b>Enduring Power of Attorney (EPA)</b>	\$200	\$300		
Appointing representatives to act in financial matters on your behalf				
<b>Advance Care Directives (ACD)</b>	\$200	\$300		
Appointing representatives to act in health and lifestyle matters on your behalf and enabling you to make decisions about your care in the event you become unable to do so				
<b>PACKAGE FEES</b>				
	Will plus EPA or ACD		Will plus EPA and ACD	
	Individual	Couple	Individual	Couple
<b>Simple Will*</b>	\$470*\$423	\$795*\$715.50	\$590*\$531	\$915*\$823.50
<b>Custom Will</b>	\$670	\$1145	\$790	\$1265
<b>Testamentary Trust</b>	\$1100	\$1665	\$1230	\$1785
<b>ADDITIONAL REQUIREMENTS</b>				
❖ Inheritance Declaration (from per document)			\$165	
❖ Contract for Mutual Wills			\$165	
❖ Revocations (from per document)			\$85	
❖ Registering Enduring Power of Attorney (incl registered post)			\$173	
❖ Trust Deed Review			\$200	
❖ Company search			\$85	
❖ Deed Amendments/Review			\$440/hour	
<b>Travelling fee/Home visit charge</b>			\$110	

This applies to all visits out of the office

\*Discount of 10% for seniors (standard documents only)  
Standard terms and conditions on following page

## ESTATE PLANNING FEE SCHEDULE – Standard Terms & Conditions

---

1. All fees set out in this fee schedule are:
  - 1.1. Current as at 25 August 2020;
  - 1.2. Subject to change without notice (we will endeavour to publish a new Fee Schedule as soon as any change to our standard fees is implemented);
  - 1.3. GST inclusive;
  - 1.4. Indicative only. We will settle a final fee for your service with you when we have your complete instructions.
  
2. The fees set out in this fee schedule are on the basis that:
  - 2.1. You (and your advisers) provide full and specific details when requested by us;
  - 2.2. Our work is limited to:
    - 2.2.1. An initial meeting with you to take instructions;
    - 2.2.2. One or two brief attendances (by telephone or email) to clarify details and instructions;
    - 2.2.3. Preparation and provision of draft documents and minor amendments or alterations;
    - 2.2.4. A meeting with you to discuss and execute documents;
    - 2.2.5. Providing original and copy documents to you and storage of original documents.
  
3. We reserve the right to charge a higher fee for your service than the fees set out in this fee schedule if:
  - 3.1. We ascertain during the course of your matter that your circumstances or needs will be outside of the standard definitions we have contemplated in this fee schedule; or
  - 3.2. During the course of our engagement, it becomes clear that work outside of the scope set out in paragraph 2 above is expected, for example:
    - 3.2.1. Numerous or unusually lengthy meetings;
    - 3.2.2. Significant changes to your instructions;
    - 3.2.3. Meeting you outside our office to take instructions or to execute documents.
  
4. If the service you require does not fit within the standard definitions or the standard packages set out in this fee schedule we will endeavour to provide an individual quote to you before we commence work. Where we have not provided a “fixed fee” quote for our work we will charge in accordance with the Higher Courts Scale of Fees (as amended from time to time).
  
5. Any out of pocket expenses (disbursements) (eg: company searches or property title searches) will be charged in addition to the professional fee charged for your service. No unusual or large disbursements will be incurred without your express authority.
  
6. If you decide not to proceed with your matter after our initial meeting we reserve the right to charge:
  - 6.1. A fee for our initial meeting of \$217.25 (incl GST) where the meeting is half an hour or less, and \$434.50 (incl GST) for up to an hour; and
  - 6.2. Fees calculated in accordance with the Higher Courts Scale of Fees (as applies from time to time) for any other work we have done in good faith in accordance with your instructions.

I/we consent to my/our personal information together with details of any wills I/we complete with Peter Fisher Lawyers to be registered with the Law Society of SA Wills Register.

Read and agreed by client(s): .....

*\*Please note that payment of our invoice is due within 14 days*