

ESTATE PLANNING SERVICES

Her Path⁷

Her Path, LLC will assist you with the following Estate Planning through our partnership with Trust & Will.

ESTATE PLANNING DOCUMENTS

trust&will

- Customized, state-specific Estate Plans for individuals and/or couples through the Trust and Will web-based platform.
- Two different plans to choose from, each with a complete set of the following customized and unique documents:

Will-Based Plan \$199/individual, \$299/couple

- Last Will & Testament
- HIPAA Authorization
- Advance Healthcare Directive (Living Will)
- Power of Attorney

Trust-Based Plan \$499/individual, \$599/couple

- Revocable Living Trust
- Schedule of Assets
- Last Will & Testament (Pour Over Will)
- HIPAA Authorization
- Advance Healthcare Directive (Living Will)
- Power of Attorney
- Certification of Trust
- Document update: First 30 days included in fee. After 30 days; \$19/year.
- Support: Available 7 days/week; provides answers to basic questions/resolves issues you have on trustandwill.com
- Attorney Support: Additional \$299. Speak with a licensed estate planning attorney; Receive expert legal advice about documents, decisions, and any questions you have about completing your plan.

PERSONAL ACCOUNTABILITY PARTNER

Her Path⁷

- Support, encouragement, and motivation to stay focused on your goals, tasks, and commitments of completing your Estate Planning documents.

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Accountability Partner

\$300

- Initial consultation to understand your Estate Planning goals.
- Establish a personalized timeline and regular check-ins to ensure you're making consistent progress, from start to finish.
- Assistance in setting up your "Will-Based" or "Trust-Based" Estate Plan on the Trust & Will platform (www.trustandwill.com).
- Final documents printed and shipped directly to you from Trust & Will to be reviewed, signed, and notarized.
- *Please note: I am not an attorney and nothing I provide or discuss constitutes legal advice. For legal questions, please consult with a qualified attorney.*

TOTAL SERVICES RENDERED

Total services rendered ("Will-Based Plan or Trust-Based Plan" and "Personal Accountability Partner") to be paid directly to Her Path, LLC.

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