

Cost Estimates		Reasonable Fee Estimates (applying the factors in Rule 9.1)		
Work Type	Usual services provided	Low	Medium	High
New / Revised Will	Guidance on instructions needed, outlining options, obtaining an understanding of family and intentions, advice how assets transfer on your passing, advice on possible claims, receiving instructions, drafting new will, provision of draft, severing joint tenancy of property, revision of draft, forwarding to you for review, meeting with you, overseeing execution of you will, provision of copies and reporting, storage in our Deeds Safe.	\$600.00	\$900.00	\$1,300.00
Minor Will amendment / Codicil	Review of current Will, guidance on instructions needed, outlining options, obtaining an understanding of family and intentions, advice how assets transfer on your passing, advice on possible claims, receiving instructions, drafting new will, provision of draft, severing joint tenancy of property, revision of draft, forwarding to you for review, meeting with you, overseeing execution of you will, provision of copies and reporting, storage in our Deeds Safe.	\$500.00	\$600.00	\$700.00
Formation of Trust	Guidance on instructions needed, outlining options, obtaining an understanding of family and intentions, advice on asset protection, risk management, succession planning, drafting Trust Deed, formation of Trustee Company, obtaining IRD number for the trust, drafting new wills for you, drafting Memorandum of Wishes.	\$1,300.00	\$1,900.00	\$2,300.00
Transfer of Home / Property into Trust (including refinancing)	Guidance on instructions and information needed, outlining options, advice in relation to vendor loan / forgiveness, drafting Asset Sale Agreement, drafting transfer documents, drafting trustees' resolutions receiving mortgagee instructions / loan documentation, implementing settlement, reporting to you and your bank, notifying the Council as to change in ownership.	\$1,500.00	\$1,900.00	\$2,300.00
Transfer of Company Shares into Trust	Guidance on instructions and information needed, outlining options, advice in relation to vendor loan / forgiveness, drafting Asset Sale Agreement, drafting transfer documents, drafting trustees' resolutions, implementing settlement, reporting to you, advising your accountant.	\$600.00	\$900.00	\$1,200.00

* Plus GST

Cost Estimates		Reasonable Fee Estimates (applying the factors in Rule 9.1)		
		Low	Medium	High
Work Type	Usual services provided			
Winding up of Trust	Obtaining the needed balance sheet information, review of Trust Deed, provision of advice on options, drafting Deed of Distribution and Early Vesting, drafting Trustees Resolutions, transfer of property, assistance with execution of documentation, implementing distribution / transfer of assets, reporting to you and your accountant.	\$800.00	\$1,400.00	\$1,800.00
Retirement and Appointment of Trustee	Review of Trust Deed, provision of advice in relation to options regarding governance of the Trust, formation of trustee company, drafting Deed of Retirement and Appointment and related documents, transfer of assets to the continuing trustees, reporting to you and your accountant.	\$500.00	\$800.00	\$1,300.00
Gifting / Forgiveness of Debt to Trust	Obtaining necessary information on Trust balance sheet, advice in relation to options and effect of proposed step, drafting Deed of Gift / Forgiveness of Debt, reporting to you and your accountant.	\$300.00	\$500.00	\$800.00
Estate – Obtaining Probate (formal appointment of Executors)	Correspondences with you, preparing draft Court Documents (application, affidavit, Probate in common form), meeting with you for execution of the same, submission of application to the Court (including payment of \$200 filing fee), receipt of Probate and provision of the same to you, reporting to you, digitisation and storage of file, provision of further certified copies of Probate at your request.	\$1,500.00	\$2,000.00	\$2,500.00
Estate - Obtaining Letters of Administration (formal appointment of Administrator where no Will)	Correspondences with you, correspondences with Births Deaths and marriages in relation to paternity search, completing Will search with relevant law society branch(es), preparing draft Court Documents (application, affidavit, Letters of Administration) meeting with you for execution of documents, submission of application to the Cour, receipt of the Letters and provision of the same to you, meeting costs of process on your behalf (\$200 filing fee, \$35.70 paternity search fee, \$75 - \$150 will search fee) reporting to you, provision of further certified copies of Letters of administration at your request.	\$1,900.00	\$2,300.00	\$2,900.00
Estate – Transmission of Land Title to Survivor	Correspondences with you, preparing transfer documentation and notice of change of ownership, meeting with you for execution of the same, certifying and signing E-Dealing, attending to registration, reporting to you, meeting	\$500.00	\$700.00	\$900.00

* Plus GST

Cost Estimates		Reasonable Fee Estimates (applying the factors in Rule 9.1)		
Work Type	Usual services provided	Low	Medium	High
	costs on your behalf (LINZ Search and registration fees of \$102.00 (single title).			
Estate – Probate, Recovery of Assets, Distribution and Winding Up	Correspondences with you, preparing draft Court Documents (application, affidavit, probate in common form), meeting with you for execution of the same, submission of application to the Court, receipt of probate and provision of the same to you, correspondences with asset holders & creditors (banks, insurers, kiwisaver etc), assistance uplifting funds / repayment of loans / payment of invoices, correspondences with accountant and / or the IRD (where required), advice to the executors in relation to distribution of Estate according to the Will, attending to distributions of gifts and residue, reporting to you, meeting applicable costs on your behalf including \$200 Court filing fee.	\$3,500.00	\$6,500.00	\$9,500.00



* Plus GST