Autonomy First

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ESTATE PLANNING PRICE GUIDE

Type of Estate

Fee estimate
(incl. GST and out-of-pocket expenses)

Each service description below is an indicative scope of work subject to professional review of each client's presenting situation

Please let us know if there are any absolute budget limits to any case or matter we undertake for you

Median fee includes married couples where mirrored documents are used

☐ Initial estate situation review

- Not exceeding one hour

$625
(Median fee $625)

☐ Straightforward estate case

- Applies to an estate that is personally owned, not other structures. Covers evaluation, witnessing or attestation of documents prepared by others
- Wills involving simple direct gifting
- Covers provision of a power of enduring guardianship, generic power of attorney, and a generic limited superannuation benefit succession evaluation

3 to 8 hours to complete

$1,500 to $3,700

(Median fee $2,800)

Including client meetings, estate situation review and attestation evidence documentation as appropriate to task.

☐ Moderate decision estate case

- Couples direct gifting
- Personal and indirect property ownership
- Single testamentary trust or direct gifts
- Powers of attorney and guardianship
- Superannuation nominations and succession review
- Powers of appointment review for trust interests

5 to 12 hours to complete

$2,500 to $4,500

(Median fee $2,800)

☐ Complicated or complex estate case

- Multiple testamentary trusts
- Complex gifting
- Self-managed super funds succession
- Family trust succession
- Multi-generational wealth issues
- Management strategy review
- Multi-jurisdiction estate management evaluation
- Conflict management, governance, compliance or dispute resolution

12 to 30+ hours to complete

$4,500 to $12,750 +

(Median fee $7,500)

However, an estimate is best provided after an initial situation review and formal work plan. For any phased quotation or ongoing support pricing is project, event or activity-based

Michael Perkins
Principal Lawyer
$440 hourly rate (incl. GST)

With over 35 years' experience, Michael's expertise in trusts, estates and private practice has helped families across generations to preserve and manage their wealth, family and community connections. As well as helping clients with family, business and wealth and succession interests, he is an expert in dealing with the challenges of corporate growth, asset protection, estate administration and succession.