

# 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 (Single and Couple)

- 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

**\$1,500 to \$3,700**

(Median fee \$2,800)

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

**3 to 8 hours to complete**

### □ 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

**\$2,500 to \$4,500**

(Median fee \$2,800)

**5 to 12 hours to complete**

### □ 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

**\$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

**12 to 30+ hours to complete**



### Michael Perkins

Principal Lawyer  
\$550 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.