



EES Paralegal Services

SERVICES OFFERED:

Personal Estate Planning Services.

Estate Planning Seminars (First Responders and Company discounts)

Probate and Trust Administration assistance and organization services.

Intermediary/Reconciliation Services for Business, Labor Disputes, Legal and Non-legal matters.

Liaison Services between Client and Attorney in litigation, legal and non-legal matters.

Corporation formation, Secretary of State filings and Corporate book organization and training.

EES Paralegal Services provides personalized and affordable services to their clients. EES understands their clients' schedule demands and allows for flexible appointments.

Elizabeth Scott protects and advocates for her clients' best interest in the complicated legal and administrative business realms.



EES Paralegal Services

Background

Elizabeth Scott is a degreed paralegal and Notary Public with over 30 years of experience. She started EES Paralegal Services in 1996. Elizabeth has worked in some of San Diego's largest law firms. She has an Associate of Science with a minor in Paralegal Studies. She has been a Chula Vista Commissioner, Kiwanis President, American Cancer Society Relay for Life Chair, Signal Hill Historical ("POSH") President, Salvation Army Board Member, and the founder and chair of Cancer Concierge Network, Inc., a 501(c)3 Nonprofit.

Elizabeth is NOT an attorney and does not give legal advice to clients in any way or form. Legal work is reviewed by Licensed Practicing Attorneys. She adheres to the Client-Attorney Privilege.

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PARALEGAL SERVICES

Estate Planning & Intermediary



**EES Paralegal Services
Serving
San Diego, Orange and Los Angeles
Counties since 1996**

Elizabeth E. Scott

Degreed Paralegal & Notary Public

Call for your Free Consultation

Phone: (619) 271-1639

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FEATURES

BENEFITS

Comprehensive Estate Plan	<i>Mechanism to carry out your decisions; avoids court intervention & involvement</i>
Living Trust	<i>Avoids Probate fees, works as mechanism to distribute assets easily</i>
Will	<i>Avoids Court applications for children, and directs your decisions of who will care for your children</i>
Power of Attorney for Assets	<i>Someone to handle your financial affairs if you're incapacitated</i>
Power of Attorney for Healthcare	<i>Someone to handle your healthcare decisions if you're incapacitated</i>
Declaration of Life Sustaining Support	<i>Gives your directions to medical authorities and family</i>
Assignment of Property	<i>Catch all for assets not funded into Trust</i>
Certificate of Trustee	<i>Document to utilize in lieu of providing full Trust document to banks, etc.</i>
Quit Claim and/or Transfer Deed	<i>Utilized to transfer and fund real property into Trust</i>

All legal forms were prepared by Licensed Attorneys who specialize in Estate Planning and Taxation or Court generated.

FEE COMPARISON WITHOUT OR WITH ESTATE PLANNING DOCUMENTS

Estate Gross Value	Attorney and Administrator statutory fees	EES Estate Plan Fees
\$184,500.01	\$ 13,070.00	*\$1,250.00
\$500,000.00	\$26,000.00	\$1,250.00
\$1,000,000	\$46,000.00	\$1,250.00
\$2,000,000	\$66,000.00	\$1,250.00
<i>Total statutory fees for both attorney and personal representative are the same, so the mandatory fees are doubled.</i>		

***Group Discount Rates Available**

Notary Public charge is additional fee.

Probate Code §10800-10850. Statutory Compensation of Probate Attorney and Personal Representative:

<u>Percentage</u>
4% on the initial \$100,000
3% on the subsequent \$100,000
2% on the following \$800,000
1% on the next 9 million dollars
5% on the next 15 million dollars

EES Paralegal Services Estate Planning include the following documents:

- WILL FOR HUSBAND/WIFE
- FAMILY TRUST
- SCHEDULE A TO LIVING TRUST
- CERTIFICATION OF TRUST
- TRANSFER OF RESIDENTIAL PROPERTY INTO TRUST
** recordation is an additional fee.*
- ASSIGNMENT OF ALL PROPERTY
- POWER OF ATTORNEY FOR ASSETS FOR HUSBAND/WIFE
- POWER OF ATTORNEY FOR HEALTHCARE FOR HUSBAND/WIFE
- DECLARATION OF LIFE SUSTAINING SUPPORT FOR HUSBAND/WIFE

Other Related Documents:

- DISCLAIMER TRUST/ A-B-C-TRUST/CHARITABLE / Q-TIP TRUST/INSURANCE TRUST
- MARITAL SETTLEMENT AGREEMENT
- LETTERS TO BANKS AND INSURANCE COMPANIES
- Probate Code 13900 - Small Estate Affidavit

THANK YOU FOR THE OPPORTUNITY TO BE OF SERVICE TO YOU.