

ATTORNEY FEE LIST

- **Living Will**
Free with every Estate Plan
- **Simple Will**
\$195.00
- **Durable Power of Attorney**
\$150.00
- **Health Care Surrogate**
\$130.00
- **Revocable Living Trust- Single**
\$1,195.00 (non tax)
- **Revocable Living Trust- Married**
\$1,795.00 (non tax)

NO ADDITIONAL COST REQUIRED
other than Filing Fees if applicable

*We provide a free ½ hour consultation to discuss
which Estate Plan is best for you and your family.*

Call 941-756-6600
www.gerlinglawgroup.com

Offices: Bradenton/Lakewood Ranch

*THE HIRING OF A LAWYER IS AN IMPORTANT
DECISION THAT SHOULD NOT BE BASED SOLELY
UPON ADVERTISEMENT. BEFORE YOU DECIDE, ASK
US TO SEND YOU FREE WRITTEN INFORMATION
ABOUT OUR QUALIFICATIONS AND EXPERIENCE.*



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FIVE COMMON MYTHS ABOUT ESTATE PLANNING

ESTATE PLANNING AND PROBATE AT AN AFFORDABLE FEE

With the husband and wife team of **Dana Laganella Gerling Esq.** and **Rodney Gerling Esq.**, our firm is a family business and we take that approach with our clients. Our attorneys take the time necessary to ensure that you fully understand the Estate Planning process. Dana and Rodney have been practicing in Manatee and Sarasota counties since 2001. Affordable Attorney, Gerling Law group has been nominated for four consecutive years as Best Small Law Firm in East Manatee County by Living on the Suncoast Magazine and won Best Legal Firm in Sarasota Magazine's Best of SRQ 2022. We have received the Bradenton Herald's People's Choice Award for *Favorite Attorney* in Manatee County for twelve years running!

Dana Laganella Gerling and Rodney Gerling have both been recognized and named Super Lawyers from 2015 through 2023. Only 2.5% of lawyers in the state of Florida have received such designation from *Florida Super Lawyers*. Dana was voted as Legal Elite in the 2016, 2017, 2018, 2019, 2020 and 2021 issue of Florida Trend Magazine. From 2013 through 2017, Dana has been named among just 7 percent of the wealth managers in the Sarasota area as a Five Star Wealth Manager for the fifth year in a row by *Sarasota Magazine*. Dana was also recently named a Leader in the Law from the Florida Association of Women Lawyers. Dana and Rodney are both members of the Manatee County Bar Associations and Manatee Chamber of Commerce. Dana is a member of the Manatee County Estate Planning Council and the Florida Bar Real Property and Estate Planning section. Rodney is a member of the Florida Bar Elder Law section.

Dana and Rodney started their own practice in 2003, providing experienced service at a reasonable fee. In addition to Wills and Trusts, we provide affordable fees in Probate, Trust Administration, and Elder Law.

*Call us at 941-756-6600,
to schedule a free half
hour consultation.*

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IF I HAVE A GOOD WILL, PROBATE WILL NOT BE REQUIRED, AND MY ASSETS CAN BE TRANSFERRED IMMEDIATELY TO THE BENEFICIARIES OF THE WILL. FALSE.

In fact, having a Will mandates a probate in most circumstances and the assets may not be transferred to the heirs for months or years. Probate is a court proceeding to transfer title from the decedent name to the living beneficiaries. Probate occurs in the state of your legal residence as well as any state where you own real property. The length of time to complete a Probate varies from state to state, but can take nine to eighteen months, on average. Probate is frustrating to the heirs and is public record.

I DO NOT NEED AN ESTATE PLAN BECAUSE I HOLD ALL MY ASSETS JOINTLY WITH ANOTHER. FALSE.

In fact, this is one of the worst ways to plan your estate. The asset may be exposed to estate and gift taxes; it does not avoid probate, just delays it until the last owners death; it may cause estate, gift, and capital gains taxes; it is subject to the creditors of all owners; and it will result in the transfer of the property to the joint owner when one owner dies, even if that was not intended.

I CAN DO MY OWN ESTATE PLAN. FALSE.

Estate Planning is more than just creating documents. It is understanding the big picture and how the legal documents will work in concert with the assets at the time they are needed.

ESTATE TAX HAS BEEN REPEALED. FALSE.

The amount of the Estate tax exemption has changed over the years but is not repealed. The exemption amount will change in the future, so it is best to consult an Attorney for up-to-date advice.

A WILL COVERS ALL MY ASSETS. FALSE.

Wills do not cover assets held as joint tenants with the right of survivorship, retirement plans, annuities, life insurance, financial account with payable on death or transfer on death death designations.

**YOU CAN'T AFFORD TO RELY ON MYTHS
WHEN IT COMES TO YOUR ESTATE.**

Find out the facts, plan carefully and execute a plan that may provide you with peace of mind and security for your loved ones.

At our firm we believe in technology. We have the best technology and software available. Our office has the capability for both video and web conferencing. We use Client Profiles to keep an electronic file of every Estate Planning client which includes contact information for your beneficiaries, Power of Attorneys, Health Care Surrogates and Personal Representatives.

Your Estate Plan is a sign of the values you hold dear and have tried to use throughout your lives. If you are like us those values are family first, hard-work, honesty, independence, self-sufficiency, and being loving and thoughtful to your life long commitment to your loved ones, your children, grandchildren, and family.

During our initial meeting we will discuss your desires, concerns and goals for you and your family, appropriate tax strategies, disability planning, various estate planning options and the fees and costs. We will also address any questions and concerns you may have. There is no charge or obligation for the meeting.



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