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## STRATFORD FINANCIAL SOLUTIONS, INC. <sup>TM</sup>

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### STRATFORD FINANCIAL SOLUTIONS INC. – TRUST CREATION SERVICES

Thank you for considering Stratford Financial Solutions Inc. for your trust creation needs. We offer a range of trust structures tailored to your specific goals and circumstances. Below is a breakdown of our offerings and associated costs:

#### TESTAMENTARY TRUSTS

1. Fractional Share Marital Trust

Starting at \$2,500 - \$5,000

Designed for married couples to divide estate assets in specific shares upon death.

2. Pecuniary Formula Marital Trust

Starting at \$2,800 - \$5,500

A precise formula for distributing a set monetary value to a spouse.

3. Generation-Skipping Trust for Minors/Children

Starting at \$3,500 - \$6,500

Ensures assets pass to grandchildren, avoiding estate taxes for one generation.

4. Pour-Over Will with Trust Provisions

Starting at \$1,800 - \$3,500

Transfers remaining assets into a trust upon death.

5. Qualified Domestic Trust (QDOT)

Starting at \$4,000 - \$7,500

Created to manage assets for a non-U.S. citizen spouse, ensuring tax benefits.

## 6. Supplemental Needs Trust for Disabled Person

Starting at \$3,500 - \$6,000

Provides for a disabled person without compromising government assistance eligibility.

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## REVOCABLE LIVING TRUSTS

### 1. Simple Revocable Living Trust

Starting at \$2,000 - \$4,000

A flexible trust allowing changes during the grantor's lifetime.

### 2. Joint Trust (Marital and Family Provisions)

Starting at \$3,000 - \$5,500

Ideal for married couples with children, combining assets into a single trust.

### 3. Generation-Skipping Trust (GST)

Starting at \$3,500 - \$6,500

Protects assets from estate taxes when passed to grandchildren.

### 4. Marital Trust with Community Property

Starting at \$2,800 - \$5,200

Manages community property within the trust structure for estate planning.

### 5. Family Trust for Descendants

Starting at \$3,500 - \$6,500

Protects family assets for multiple generations.

## IRREVOCABLE LIVING TRUSTS

### 1. Irrevocable Marital Trust

Starting at \$3,500 - \$6,500

Provides for a surviving spouse while offering estate tax benefits.

### 2. Asset Protection Trust (Delaware)

Starting at \$5,000 - \$8,500

Shields assets from creditors, structured under Delaware's strong legal protections.

### 3. Dynasty Trust (Delaware)

Starting at \$5,500 - \$9,500

Allows assets to be passed down for multiple generations without incurring estate taxes.

### 4. Self-Settled Medicaid Trust (New York)

Starting at \$6,000 - \$10,000

Protects assets while qualifying the grantor for Medicaid.

### 5. Supplemental Needs Trust

Starting at \$4,000 - \$7,500

Ensures long-term financial care for a disabled individual.

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## BUSINESS TRUSTS

### 1. Massachusetts Business Trust (Corporate Stock)

Starting at \$3,000 - \$5,500

Ideal for managing corporate stock holdings within a trust structure.

## 2. Real Estate Business Trust

Starting at \$3,500 - \$6,500

Manages real estate holdings for investment or family purposes.

## 3. General Purpose Business Trust

Starting at \$3,000 - \$5,500

Offers flexibility for business operations or holding various assets.

Prices vary based on the complexity and specific client needs. Additional services or amendments to trust documents will incur separate fees.

We are happy to schedule an initial consultation to assess your unique situation and provide tailored recommendations. For more information or to book a consultation, please visit our website [www.stratfordtaxgroup.com](http://www.stratfordtaxgroup.com)