

CALIFORNIA TRUST

Scott Schoeller, President

4025 Camino Del Rio South, Suite 300

San Diego, CA 92108

619-542-7771 Tel

619-253-0151 direct

www.CaliTrusts.com

A+ Rating with the BBB

Protecting Your Loved Ones

Revocable Living Trust Package

Living Trust
Durable General Power of Attorney
Advance Health Care Directives
Living Will
Pourover Will
Transfer Deed to Trust (if needed)
Certificate of Trust
Declaration of Trust
Assignment of Personal Effects to Trust
Marital Property Agreement (if married)
And more!

Includes in home appointment!

\$1695 (Individual) \$1895 (Married Couple)
\$1995 (Special Needs Trust - Individual)

Will Package

Last Will & Testament
Durable General Power of Attorney
Advance Health Care Directives
Living Will
Beneficiary Deeds \$300
\$995 (Individual) \$1195 (Married Couple)

California Trust, LDA #153

San Diego County

“I am not an attorney, I can only provide self help services at your specific direction”

“California Estate & Financial Group, Inc., dba “California Trust” is not a Law firm and does not provide Legal advice.”

\$2295 (A-B Trust/Disclaimer)
\$2500 (Special Needs Trust – married couple)

Plus Recording and Notary Fee

Additional Services

Trust Amendments
Power of Attorneys
Quit Claim Deeds
Deed Transfers to LLC or Corporation
Irrevocable Life Insurance Trust (ILIT)
Charitable Remainder Trust
Homestead Declaration
Next Day Service Available

IN HOME APPOINTMENTS

Scott Schoeller offers more than 30 plus years of Living Trust experience. He has built a successful business in San Diego County serving thousands of clients. His corporate referrals include Bank of America, Merrill Lynch, BMO Bank, Morgan Stanley, Edward Jones, Chase, LPL Financial, Ameriprise Financial Services and Merrill Lynch, to name a few. Scott prides himself on the personal relationships he builds with each family as they prepare to make important choices that will stand the test of time. Scott Schoeller features quality Trust documents at competitive rates so that this critical documentation is more widely available to protect the future of your family and loved ones.