

Welcome Guide and Services Overview



MATHEWS LAW, PLLC



Lisa Mathews, Esquire
Founder and Managing Attorney

Welcome to Mathews Law!

We're so glad you found us!

Our mission is simple — to help you protect the people and things that matter most.

With friendly service and clear guidance, we'll walk with you every step of the way.

We look forward to getting to know you.

Our Attorneys

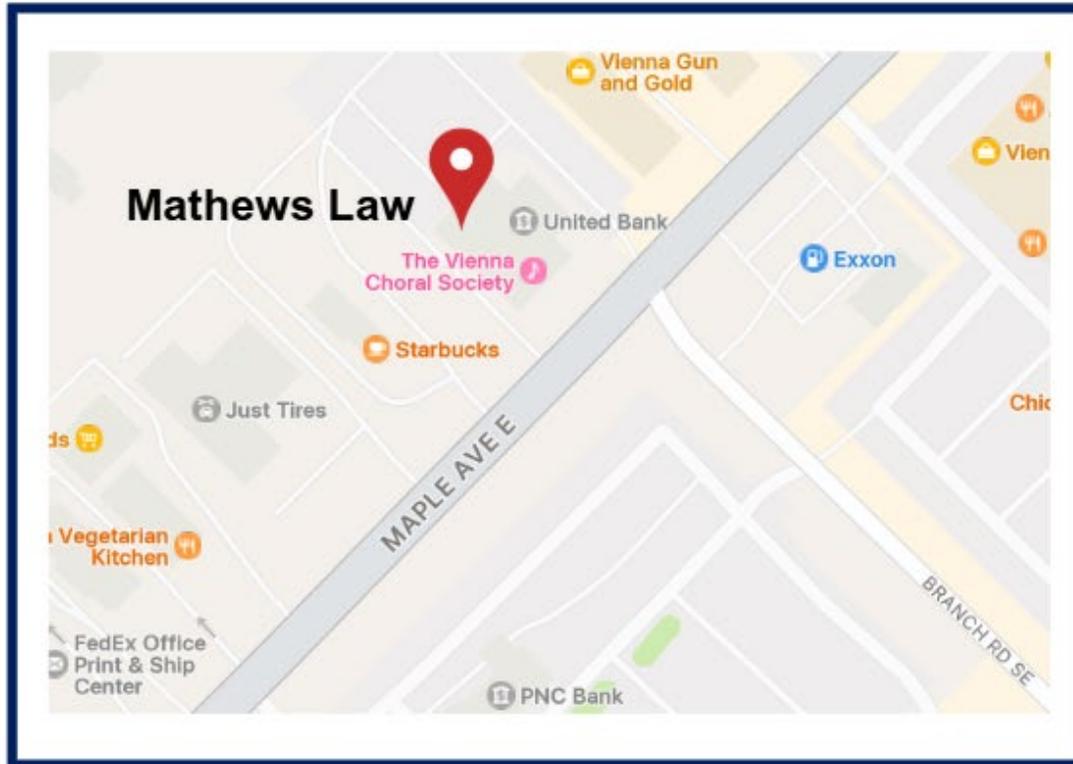


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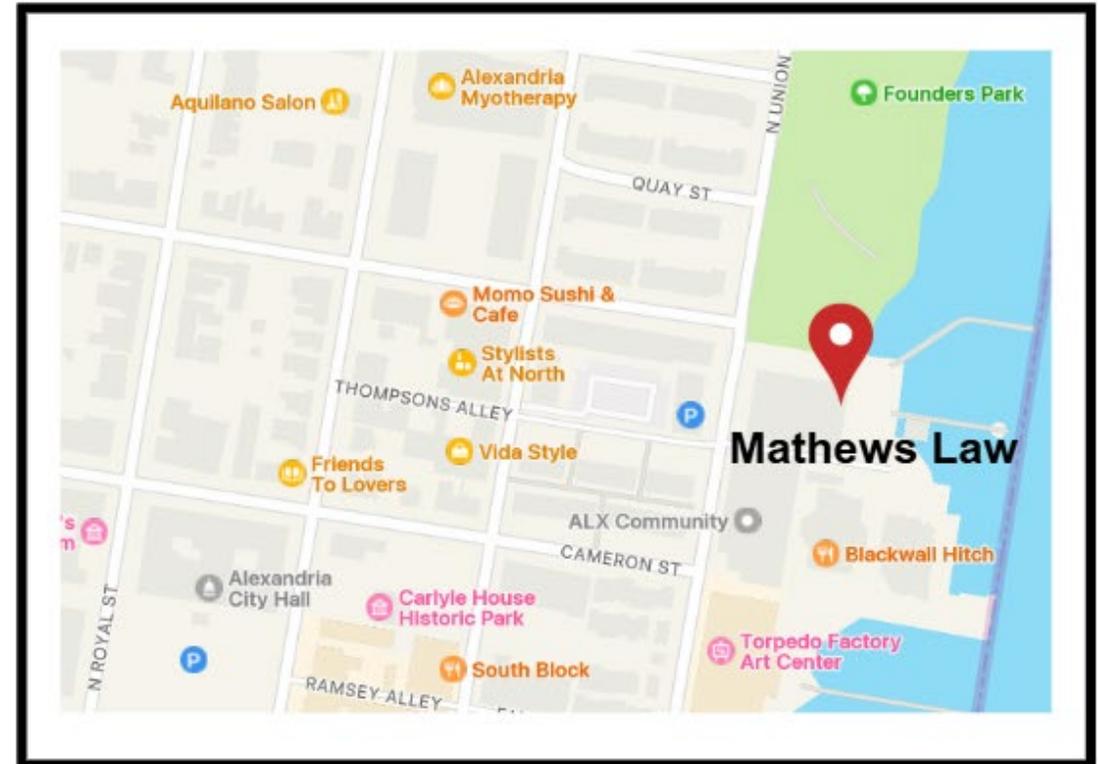


Perry Jones, Esquire
Associate Attorney

Two Convenient Locations



Vienna Office
374 Maple Ave. E., Suite 300
Vienna, VA 22180



Old Town Alexandria Office
211 N. Union Street, Suite 100
Alexandria, VA 22314

What Makes Us Different

Mathews Law is a boutique firm focused on estate planning and estate administration.

We design estate plans with real-world administration in mind, helping reduce stress and confusion for loved ones later.

We make your life easier after the death of a loved one by handling the administration with care.

We take an education-first approach, explaining your options clearly so you can make confident decisions.

Our process is calm, supportive, and respectful of the emotional nature of this work.

We use efficient, modern systems to provide a smooth and convenient client experience.





What To Expect When You Work With Us

- ✓ A step-by-step process so you always know what's next
- ✓ Time to ask questions and make informed decisions
- ✓ Clear communication and realistic timelines
- ✓ Support from a dedicated, approachable team
- ✓ Convenient virtual meetings when appropriate
- ✓ Access to your attorney

We Offer Comprehensive Services for You and Your Loved Ones



MATHEWS LAW, PLLC

Estate Planning

Client Care Membership Program

Probate and Trust Administration

LLC Formation

Special Needs Planning

Prenuptial/Postnuptial Agreements

Medicaid Planning

Advance Tax Planning

Comprehensive Estate Planning

Our estate planning services are designed to provide clarity, protection, and peace of mind.

Will-Based Estate Plan

- A streamlined planning option for individuals or couples whose needs do not require a trust-based plan.
- Starting at:
 - \$1,750 (individual) | \$2,500 (couple)

Foundational Trust-Based Estate Plan

- A comprehensive trust-based plan designed to avoid probate, protect privacy, and provide clear direction for loved ones.
- Starting at:
 - \$3,350 (individual) | \$4,350 (couple)
 - Deeds: \$500
 - Optional asset protection provisions: additional \$500–\$2,000

Concierge Trust-Based Estate Plan

- Our most comprehensive, white-glove planning experience, with a higher level of guidance and support in aligning assets with the estate plan.
- Starting at:
 - \$5,350 (individual) | \$6,350 (couple)
 - Optional asset protection provisions: additional \$500–\$2,000

Additional Documents

Some clients just need to solve a specific problem and are not looking for a full estate plan at this time. We are happy to help!

Deeds

- We offer quit-claim deeds, deeds of gift, deed transfers to trust, and transfer-on-death deeds.
- Fee:
 - \$750 (Discounted to \$500 if included in estate plan package or new LLC)

Power of Attorney OR Advance Medical Directive

- Just need to grant authority to someone to act on your behalf? Not a problem.
- Fee: \$500

Emergency Essentials Plan

- Get a power of attorney, advance medical directive, HIPAA authorization, and emergency wallet card.
- Fee: \$950

Client Care Membership Program

Our Client Care Program provides ongoing support to help ensure your estate plan remains current, effective, and aligned with your life as it changes. Enrollment is optional and available after your estate plan is complete.

Level 1: Peace of Mind Plan

- Foundational support for maintaining your estate plan
 - Twice-a-year check-in to review your plan
 - Annual update to your estate plan for basic changes (\$150 printing fee)
 - Quarterly education webinars with attorney
 - 10% off on all services
 - Emergency Essentials Plan for family (VA and MD residents only)
- Fee: \$65 per month | \$750 per year (paid in full)

Level 2: Legacy Plan

- Everything in the Peace of Mind Plan, plus:
 - Quarterly check-in to review your plan
 - Annual strategy meetings with your attorney
 - Concierge support to keep assets properly aligned with your plan
- Fee: \$130 per month | \$1,500 per year (paid in full)

Probate and Trust Administration

Administering an estate after the loss of a loved one can feel overwhelming. We provide steady, experienced guidance to help personal representatives and trustees move the administration process forward with clarity and care.

Guidance Meeting with Attorney

- Our required first step for all Estate Administration engagements. Our attorney provides clarity, so you know how to move forward.
- Fee: \$500

Small or Simplified Estates

- For estates that qualify for streamlined administration or involve limited guidance.
- Fee:
 - Initial deposit: \$2,500
 - Hourly rate for work performed (Attorney: \$375/hour, Paralegal \$185/hour)

Probate

- For estates that require formal court supervision, we assist personal representatives with navigating the probate process from start to finish.
- Fee:
 - Initial deposit: \$5,000
 - Hourly rate for work performed (Attorney: \$375, Paralegal: \$185)

Trust Administration

- For individuals serving as successor trustee, we provide guidance and support in carrying out trustee duties and settling the trust in accordance with its terms.
- Fee:
 - Initial deposit: \$5,000
 - Hourly rate for work performed (Attorney: \$375, Paralegal: \$185)

LLC Formation

We offer LLC formation services designed to support asset protection, estate planning, and long-term ownership goals. Our approach ensures the entity is properly formed, documented, and aligned with your broader planning strategy.

LLC Formation

- A comprehensive LLC formation package designed to establish the entity correctly from the outset.
- Our services include preparation and filing of the LLC, a customized operating agreement, coordination of assignment to a trust when applicable, an asset protection strategy meeting with an attorney, and guidance on next steps for local business license requirements.
- Fee: \$1,250

LLC Formation Plus Deed

- For clients who need to transfer real property into an LLC as part of their planning.
- This package includes LLC formation, preparation and recording of the deed, and coordination with the mortgage company as needed, including a lender notification letter.
- Fee: \$1,950

Special Needs Planning

Special needs planning requires careful coordination to protect both quality of life and eligibility for important public benefits. We provide thoughtful, customized planning to help families make informed decisions and avoid unintended consequences.

Special Needs Add-on to Parent's Estate Plan

- Planning for a child with special needs can sometimes be incorporated into a parent's estate plan.
- Fee: \$1,000-\$5,000 (in addition to the fee for the parent's estate planning documents)

Benefits Eligibility Consultation

- A focused strategy session with an attorney to evaluate benefits eligibility and planning options for an individual with special needs with clear guidance on next steps.
- Fee: \$1,500

Benefits Eligibility Implementation

- Once a strategy is established, we assist with implementation to ensure the plan is properly executed and coordinated.
- Fee: \$3,500 - \$10,000

Prenuptial & Postnuptial Agreements

Prenuptial and postnuptial agreements can play an important role in protecting assets, clarifying financial expectations, and supporting long-term planning—particularly for individuals entering or already in marriage with existing assets, business interests, or children from prior relationships.

We approach these agreements thoughtfully and collaboratively, with an emphasis on clarity, fairness, and long-term enforceability.



Mediated Agreement

- Our attorney serves as a neutral mediator to work with both parties to negotiate and draft a mediated prenuptial or postnuptial agreement.
- Fee: \$3,000

Medicaid Planning

We provide thoughtful, strategic guidance to help individuals and families plan ahead or respond to urgent care needs while preserving assets when possible.

Medicaid-Enhanced Estate Plan

- An estate plan that includes enhanced provisions designed to support Medicaid planning and long-term care considerations.
- Fee: \$1,000 add-on to Estate Planning package

Medicaid Pre-Need Planning

- Advance planning for individuals who may need long-term care in the future but are not yet facing an immediate Medicaid application.
- Fee: \$2,500 (planning strategy), \$7,500-\$20,000 (implementation)

Medicaid Crisis Planning

- Guidance and implementation of a strategy designed to ensure Medicaid eligibility for individuals who need to qualify for Medicaid in the near term due to an immediate or pending long-term care need. Fee: \$15,000-\$25,000 (includes Medicaid application)

Advance Estate Tax Planning

Advance tax planning requires careful analysis, strategic design, and thoughtful implementation. We provide forward-looking estate tax planning to help clients reduce potential estate tax exposure while aligning strategies with financial goals.

State Estate Tax Planning

(MD clients only, VA does not have an estate tax)

- We conduct a comprehensive analysis of potential state estate tax exposure and provide strategic recommendations to reduce or eliminate state-level estate taxes where possible.
- Fee:
 - \$2,500 (analysis and recommendations)
 - \$5,000-\$20,000 (implementation)

Federal Estate Tax Planning

- We provide detailed analysis and strategic recommendations tailored to your asset profile, family structure, and long-term objectives. *We accept individual clients with a net worth up to \$20 million and couples with net worth up to \$40 million.*
- Fee:
 - \$5,000 (analysis and recommendations)
 - \$7,500-\$30,000 (implementation)



Rohey Sanyang
Client Service Coordinator

We would love to work with you!

Please contact our Client Service Coordinator,
Rohey, if you have any questions.

- Email: clientservice@mathewslawpllc.com
- Phone number: [\(703\) 215-2088](tel:(703)215-2088)