

ESTATE PLANNING PACKAGES

WILL-BASED PLANNING

For the family or individual who...

Understands that their estate will likely be subject to the legal process called probate if there is a death, wants to guarantee that their minor children are taken care of, wishes to appoint individuals to make medical and financial decisions on their behalf when they are unable to act.

Your plan...

Includes a will, health care power of attorney and advance health care directive, financial power of attorney, and protective provisions for minor children. Your will may be drafted to create trusts at your death to protect property, accounts, and other assets for the people you love.

Asset transfers (beneficiary designations) will be handled by you, with guidance from us.

Base Price Range: Married \$2295 - \$4295 | Single \$1795 - \$2795

REVOCABLE LIVING TRUST PLANNING

For the family or individual who...

Wants the assurance and peace of mind of knowing that their family wealth will be passed on to their children or heirs with the most ease and convenience possible, without court involvement or unnecessary delays. This is also for those who want lifetime incapacity protection, maintenance of privacy, and the reduction of the financial burdens on their families following their death.

Your plan...

Provides the peace of mind of knowing that you have documents that are immediately able to protect you in the event of incapacity. This plan keeps your loved ones out of court, keeps your affairs completely private, and avoids burdening your family with the costs of probate following your death. Includes revocable living trust(s), health care power of attorney and advance directives, pour-over will, financial power of attorney, and protective provisions for minor children.

Asset transfers (trust funding) will be handled by you, with guidance from us.

Base Price Range: Married \$3795 - \$5795 | Single \$3295 - \$4295

WEALTH PRESERVATION PLANNING

For the family or individual who...

Needs sophisticated tools to plan for the transfer of business interests, protection from creditors, creation of additional trusts such as standalone retirement trusts, irrevocable life insurance trusts, and special asset protection trusts.

Your plan...

Provides for additional asset protection and sophisticated estate and tax planning strategies.

This plan includes everything in the revocable living trust plan, plus additional trusts or business entities. Asset transfers will be handled by you, with guidance from us.

Asset transfers (trust funding) will be handled by you, with guidance from us.

Base Price Range: \$4295+