




FAMILY WEALTH PLANS

Our thoughtful estate planning packages provide varying levels of protection, suited to your unique needs and goals.

LEVEL ONE	LEVEL TWO	LEVEL THREE
 <p style="text-align: center;">FAMILY PLAN</p>	 <p style="text-align: center;">TRUST PLAN</p>	 <p style="text-align: center;">WEALTH PLAN</p>
<p>FOR THE FAMILY WHO ...</p> <p>Doesn't have assets that would go through the court process called probate upon death, but who do want to guarantee their minor children are well cared for no matter what, their health care wishes are turned into directives and their loved ones are able to access their assets using a durable power of attorney if they become incapacitated.</p> <p>Keeps your family out of conflict.</p>	<p>FOR THE FAMILY WHO ...</p> <p>Wants the total assurance and peace of mind of knowing your family would stay out of Court and out of conflict, in the event of your death or incapacity. And wants to ensure assets will be transferred to heirs with the most ease and convenience possible in the privacy of our office without court involvement.</p> <p>Under this plan, you may also opt to protect your beneficiary's inheritance from lawsuits, spouses and estate taxes.</p>	<p>FOR THE FAMILY WHO ...</p> <p>Wants the total assurance and peace of mind of the Trust Plan AND also all of the comfort of knowing that assets transfers have been taken care of by our office, so nothing is left out or lost because you got too busy.</p> <p>This plan is appropriate for busy families who want the least amount of personal effort and the greatest amount of convenience and care.</p>
<p>YOUR FAMILY PLAN ...</p> <p>Includes your Will, Health Care Directives & Powers of Attorney so you know that you are well taken care of if anything happens. Also, includes the Kids Protection Plan® to ensure your children are always raised by the people you want, in the way you want and never taken out of your home by the authorities.</p> <p>May include post-death trust planning to protect assets for the people you love.</p> <p>We've got your family covered.</p>	<p>YOUR TRUST PLAN ...</p> <p>Provides peace of mind knowing we are here to guide you during life & care for your family later.</p> <p>The Trust Plan keeps your loved one's out of Court, all of your affairs totally private & ensures your family can turn to us when necessary.</p> <p>All asset transfers will be handled by you, with unlimited guidance and support from us. A Kids Protection Plan® will be included if you have minor children.</p>	<p>YOUR WEALTH PLAN ...</p> <p>Includes all components of the Trust Plan PLUS we analyze how each of your assets are titled and handle all asset transfers for you to guarantee your plan works for your family.</p> <p>We prepare a Family Wealth Inventory, complete all bank, brokerage, insurance and retirement account documents to transfer title and change beneficiaries.</p>
<p>FEE LEVEL:</p>	<p>FEE LEVEL:</p>	<p>FEE LEVEL:</p>

Fourth Dimension...Beyond the Living Trust

Fourth Dimension... Beyond the Revocable Living Trust

**TRUST PLAN
LEVEL TWO**

**FAMILY PLAN
LEVEL ONE**

**LEVEL THREE
WEALTH PLAN**

Fourth Dimension... Beyond the Revocable Living Trust

