

INCLUDED IN THE ESTATE PLANNING PACKAGE:

- Last Will and Testament
- Probate Avoidance Living Trust (Includes guide for funding your Living Trust)
- Pet Trust
- Power of Attorney
- Living Will/Advance Directives
- Healthcare Surrogate
- HIPAA Authorization

One plan covers you and your spouse

Additional Services: (optional)

Deed Transfer to the Trust \$200

Business Transfer to the Trust \$750

Lawyer Review & minor revisions \$400



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Premium Estate Planning Package

We help you prepare your own Estate Plan
to protect your family, your health and your legacy

Take care of tomorrow today.





Be prepared. Take care of tomorrow today.



YES NO Are you comfortable with the state deciding what happens to you and your most important possessions?

YES NO Should something happen to you, have you specified who will care for your children?

YES NO Do you want your children to control their inheritance when they turn 18?

YES NO Did you know when your children turn 18, you no longer have access to medical records or influence over their medical decisions unless your children name you in the proper medical authorizations?

YES NO If something happens to you, do you know who will make healthcare decisions for you?

YES NO Have you completed a HIPAA authorization so select members of your family (including your spouse) will have access to your medical information?

YES NO Have you completed an Advance Directive/Living Will to acknowledge your intentions about life support?

YES NO Have you completed a financial Power of Attorney naming someone who will handle your financial and legal affairs?

YES NO Have you completed a Will or Trust to specify how your estate will be distributed upon your death?

YES NO Do you want your family going through a lengthy, public process (known as probate) at the time of your death?

If you answered “no” to any of these questions, we can help!

Who would you appoint to make healthcare decisions for you if you can’t?
A Medical Power of Attorney names who you trust to make healthcare decisions on your behalf when you can’t.

First Choice/ Full Legal Name/Relationship Second Choice/ Full Legal Name/Relationship

Who would you choose to communicate with your doctors and access your private medical information?
By completing a HIPAA form, your medical documents will be available to your family members to make educated decisions.

First Choice/ Full Legal Name/Relationship Second Choice/ Full Legal Name/Relationship

Who will serve as your executor/personal representative? Without a Will, state law dictates who gets your assets. This is true even if you have already told friends and family which assets you want them to have when you die.

First Choice/ Full Legal Name/Relationship Second Choice/ Full Legal Name/Relationship

Who will take care of your minor children if something were to happen to you?
The only way to guarantee that your wishes are fulfilled is by naming a Guardian in your Will.

First Choice/ Full Legal Name/Relationship Second Choice/ Full Legal Name/Relationship

Who would you appoint as Successor Trustee?
By creating a Revocable Living Trust and transferring your assets, you can save your family the time and expense of the probate process.

First Choice/ Full Legal Name/Relationship Second Choice/ Full Legal Name/Relationship

Who will be your Financial Power of Attorney to pay your bills, write checks, vote stock, etc.?
A Power of Attorney allows you to appoint someone to act on your behalf with regard to financial affairs, business or other legal matters.

First Choice/ Full Legal Name/Relationship Second Choice/ Full Legal Name/Relationship

Your financial future, your family’s financial future, and your legacy depend on how you preserve your estate.