



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>FAMILY PLAN</p>	 <p>TRUST PLAN</p>	 <p>WEALTH PLAN</p>
<p>FOR THE FAMILY WHO ...</p> <p>Doesn't have assets that would have to go through the court process called probate, but 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>FOR THE FAMILY WHO ...</p> <p>Wants the total assurance and peace of mind of knowing Family Wealth will be transferred to heirs with the most ease and convenience possible in the privacy of our office without court involvement.</p> <p>Clients choosing the Trust plan may also opt to protect their 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 comfort of knowing that assets transfers have been taken care of by our office.</p> <p>This plan is appropriate for busy families who want to least amount of personal effort and the greatest amount of convenience and care. WE DO IT ALL FOR YOU!</p>
<p>YOUR FAMILY PLAN ...</p> <p>Is a will-based plan that provides the peace of mind of knowing we are here to help you navigate the system during life and for your family after you are gone.</p> <p>The Will Plan also includes Health Care Directives and Powers of Attorney so that you know that you are well taken care of if anything happens as well as a 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>YOUR TRUST PLAN ...</p> <p>Is a trust-based plan that provides the peace of mind of knowing we are here to help you navigate the system during life and for your family after you are gone.</p> <p>The Trust Plan also includes Wills, Health Care Directives, and Powers of Attorney so that you know that you are well taken care of in addition to your assets.</p> <p>All asset transfers will be handled by you, with unlimited guidance and support from us. The Kids Protection Plan may also be included to ensure your children are never taken from your home and are always raised by the people you want.</p>	<p>YOUR WEALTH PLAN ...</p> <p>Includes all the components of the Trust Plan, PLUS we analyze how each of your assets is titled or designated.</p> <p>We prepare an asset spreadsheet confirming what you own and how it is held and then complete all of the forms and requests necessary to transfer every asset and designate every beneficiary for the maximum protection of your family and your assets.</p>
<p>FEE LEVEL: \$2,000</p>	<p>FEE LEVEL: \$4,000 - \$6,000</p>	<p>FEE LEVEL: \$6,000 - \$8,000</p>

Fourth Dimension...Beyond the Living Trust





TRUST PLAN
LEVEL TWO

FAMILY PLAN
LEVEL ONE

WEALTH PLAN
LEVEL THREE

Fourth Dimension... Beyond the Revocable Living Trust

Fourth Dimension... Beyond the Revocable Living Trust