

Estate Protection Planning

Understanding How to Protect
Your Family and Assets



Let's Take a Poll

Do you have any estate planning legally in place?

- Power of Attorney
- Health Care Directive
- Will
- Living Trust

3 Ways to Manage Your Estate

- Do Nothing
- A Will
- A Living Trust

Do Nothing

- Results in Probate
- No written plan

A Will

- Legal and names a beneficiary & executor.
- Guarantees probate.
- Easy to contest in court.

Reasons to Avoid Probate

- Minor children may not have the guardian you would have chosen.
- It's public for everyone to see.
- Creditors and heirs can make a claim.

Reasons to Avoid Probate

- It can take 1-2 years.
- Assets cannot be distributed.
- Cost is 6% to 8% of your estate value in court and attorney fees.
- Your plan is not the courts plan.



A Living Trust Can

- Avoid Probate
- Created while you are living
- Assets are in the name of the trust
- Death or incapacity, the trust continues
- Prevents conservatorship

Who Needs A Living Trust?

- Anyone who owns real estate
- If you have valuable assets
- Blended family/second marriage

- Minor or children with special needs
- If you want your affairs to be private
- Business owners

Probate Calculator

Market Value Assets = \$400,000

Probate & Attorney Fees = 8%

$\$400,000 \times 8\%$ = \$32,000

\$32,000 is paid by the estate

Our Services



Living Trust



Trust
Administration



Business
Formation



Incapacity
Planning



Elder Care
Law



Special Needs
Services

Our Living Trust Includes:

- POA Financial
- POA Health
- Pour Over Will
- Advanced Health Care Directive
- Trust Funding
- Deeds
- Complete Notary Service
- 1 Year Legal Plan Membership
- + More

Legal Plan Membership Includes:

- Access to nationwide attorneys
- Free simple amendments to your living trust
- Free 30-minute attorney consultation for any legal matter
- 25% OFF legal fees beyond initial consultation

A young boy with blonde hair, wearing a blue Superman cape and mask, is sitting on a windowsill. He is holding a small Superman action figure in his right hand. The background shows a window with a view of a cityscape. The image is partially obscured by a white diagonal shape on the left side.

A Living Trust Never Dies

- You own and control it.
- It is a legal entity.
- Similar to a corporation.

True

OR

False

Do our Living Trust cost
30% to 50% less than typical
attorney fees?

True

If you hire a traditional attorney, expect to pay \$3,000 to \$6,500 for a living trust.

Let's Compare

Probate Can Be –

- Expensive
- Time Consuming
- Traumatic
- Public

Living Trust Can –

- Avoid Probate –
 - No Probate Fees
 - 1-3 Days to Settlement once you have a death certificate
 - Private
- Prevent Conservatorship
- Reduce or Eliminate Estate Taxes

A young man and woman are leaning over an elderly couple, smiling and looking at something together. The young man is on the left, wearing a grey sweater over a white collared shirt. The young woman is on the right, wearing a brown sweater over a teal collared shirt and glasses. The elderly man is in the center, smiling, wearing a grey sweater. The elderly woman is on the right, wearing a plaid sweater and glasses. The background is a warm, indoor setting with a window and some greenery.

Estate Planning Flat Fee Pricing

- Trust Portfolio starting at \$x,xxx.xx.
- Financing and payment plans available.



Schedule Your Free Consultation

Call or email us now to book your
consultation: