



ESTATE PLANNING SERVICES

PHASE I – ANALYSIS OF CURRENT SITUATION AND CORE DOCUMENTS

- Initial meeting to gather information and determine client's goals and objectives
- Provide summary of current situation and planning recommendations
- Review recommendations and agree on action plan for implementation
- Prepare recommended Core Documents (i.e., Will, Revocable Living Trust, Durable Financial Power of Attorney, and Health Care Power of Attorney/Advance Directive, as applicable), which may include:
 - Probate avoidance and privacy with implementation of properly funded Revocable Living Trust (RLT)
 - Specific guidance for management of financial and health care matters in the event of incapacity (with RLT)
 - Ongoing Marital/Family Trusts for surviving spouse and/or children/descendants
 - Appointment of Guardian and Trustee for minor children
- Appointment of Caregiver and Trust for Pet(s)
- Designation of Investment Manager to handle investment of trust assets in coordination with Trustee
- Appointment of Trust Protector to remove and replace Trustee and exercise other special administrative powers

- Finalize and execute Core Documents; provide Estate Plan Summary Chart and Revocable Living Trust Funding Memorandum (as applicable)
- Annual review meeting to discuss changes in current situation and applicable law changes (with enrollment in Maintenance Program)

PHASE II – ADVANCED PLANNING

- Provide assistance with asset retitling and funding of Revocable Living Trust (as applicable)
- Coordinate with client's other advisors to assist with and complete implementation of planning recommendations

- Prepare and implement advanced planning recommendations, such as:
 - Irrevocable Life Insurance Trust (ILIT)
 - Irrevocable Spousal Lifetime Access Trust (SLAT) / Dynasty Trust as receptacle for lifetime gifting
 - Education Trust for Children
 - Stand-Alone Retirement Trust
 - Stand-Alone Special Needs Trust
 - Stand-Alone Pet Trust
 - Family Limited Liability Company (LLC) for asset protection and lifetime gifting
 - Grantor Retained Annuity Trust (GRAT)
 - Installment Sale to Grantor Trust (ISGT)
 - Charitable Remainder Trust (CRT)
 - Charitable Lead Trust (CLT)
 - Advice regarding charitable gifting, including donor advised funds and private foundations

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Estate Planning



Asset Protection



Business Planning



Fiduciary Services



Tax Services



Family Office