Estate & Wealth Strategies Planning Process

Review of Goals and Existing Documents

- Prior Wills/Trusts, Pre-nuptial Agreements
- Powers of Attorney
- Living Will Declarations
- Health Care Surrogate Designations
- Insurance Policies - Life, Property, Disability, Long-Term Health
- Real Estate Deeds, Leases
- Titles to Auto(s), Boat(s), Plane(s), Equipment, etc
- Tax Returns - Individual, Business, Intangible,
- Retirement/Employee Stock Ownership Plans, IRA Accounts
- Annuities, CDs, Bonds, Stock (Marketable, Closely-Held), Options
- Ownership interests in Partnerships, Corporations, Limited Liability Co
- Financial Statements, Bank Statements, Notes, Other Investments, Debts

Review of Alternatives with Client(s)

- Review the various Alternatives available in each situation with Client(s)
- Design a Plan that will provide the Goals to be attained for Client(s)

Preparation of Legal Documents

Implementation of Plan

- Asset Detail and Ownership
- Coordination with Advisors of Implementation Checklist
- Re-titling Ownership of Property into Legal Instruments
- Changing Beneficiary Designation Forms
- Flow Chart summarizing Transfers

Maintenance

- Updating of Asset Detail and Ownership
- Annual Checklists
- Status of Implementation is reviewed
- Updating for changes in Family Circumstances
- Updating Due to Changes in the Law
- Utilization of New Techniques
- Address and Name Changes

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