

Logo
Here

Company Name

Slogan Here...

Title Here...

Name: _____

Date: _____

Step 1: Step and time expectations...

Step 2: Step and time expectations...

Step 3: Step and time expectations...

Who and how to benefit?

1.

2.

3.

What would you like avoid?

1.

2.

3.

Married: Y / N

Durable POA:

Health POA:

Business Owner: Y / N

Veteran: Y / N

Notes

Questions

Quote: \$ _____

This quote is not guaranteed and is subject to change for any reason.

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You work hard to create the life you have.
It's important to plan the impact you want you hard work to have.

How much control do you want over your plan?

		Probate	Distribution	Taxes
- Heirlooms & Personal Property		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Investments				
- Accounts				
- Home and Real Estate		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
- Other Property				
- Businesses		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Which achieves what you want?

Simplified Visual Example



Final Will & Testament

After Death Only

1. Distribution Plan
 - Limited Protections
 - Limited Control
2. Guardianship
 - Children
 - Pets



Revocable Living Trust (RLT)

During Life & After Death

1. Avoid Probate
 - Privacy
2. Incapacitation Planning
 - Power of Attorney (POA)
 - Durable & Health
3. Additional Protection
 - Business
 - Property & Assets
 - Full Control (Living Document)
4. Distribution Planning
 - Asset & Legacy Protections
 - Additional Control

This document is not legal advice and is for illustration purposes only. Consult with a qualified professional before making any legal, tax, or investment decisions.