

A hand is shown holding a stack of several light-colored wooden blocks. On top of the stack sits a miniature model of a white house with a grey roof, multiple chimneys, and windows. The background is a soft, out-of-focus grey.

**Protecting  
Your  
Estate**

Keeping it Safe from  
Creditors, Taxation  
&  
Your Family

**PREVIEW**

Advisor Name Here  
Company Name



PREVIEW



# DEATH & TAXES

**PREVIEW**



# CHOICE AND CONTROL

**PREVIEW**







**PREVIEW** **LEGACY**

What's Important About  
Money  
to YOU?





# “Happy Money”



# 1. Buy Experiences





## QUESTION...

What % of American adults do not have a Will or other estate plan in place ... ?

55%

## QUESTION...

What % of American adults do not have a living will or medical directive . . . ?

59%



QUESTIONS  
TO ASK  
YOURSELF:



“Could you  
outlive your  
money?”





Could you outlive your money?

- cash-flow insecurity?
- inflation?
- the “Care-Giving Squeeze”?
- medical expenses?
- financial risk?
- longevity risk?

**PREVIEW**



“Do you know exactly what would happen to you if you were incapacitated tomorrow?”

**PREVIEW**

**3**





“Are you, or part of your family, a ‘blended-family’?”



6

“Do you know the potential **tax** liability on your estate?”



**PREVIEW**

9



# The BLOWN QUESTION

“Is your Estate Plan  
leaving a Legacy  
or a Mess?”

**PREVIEW**

A woman with dark hair, wearing a grey sweater and blue jeans, is sitting at a wooden desk. She has her right hand pressed against her forehead, looking down with a stressed or overwhelmed expression. On the desk in front of her are several papers, a calculator, and a pen. The background is a blurred indoor setting with a window.

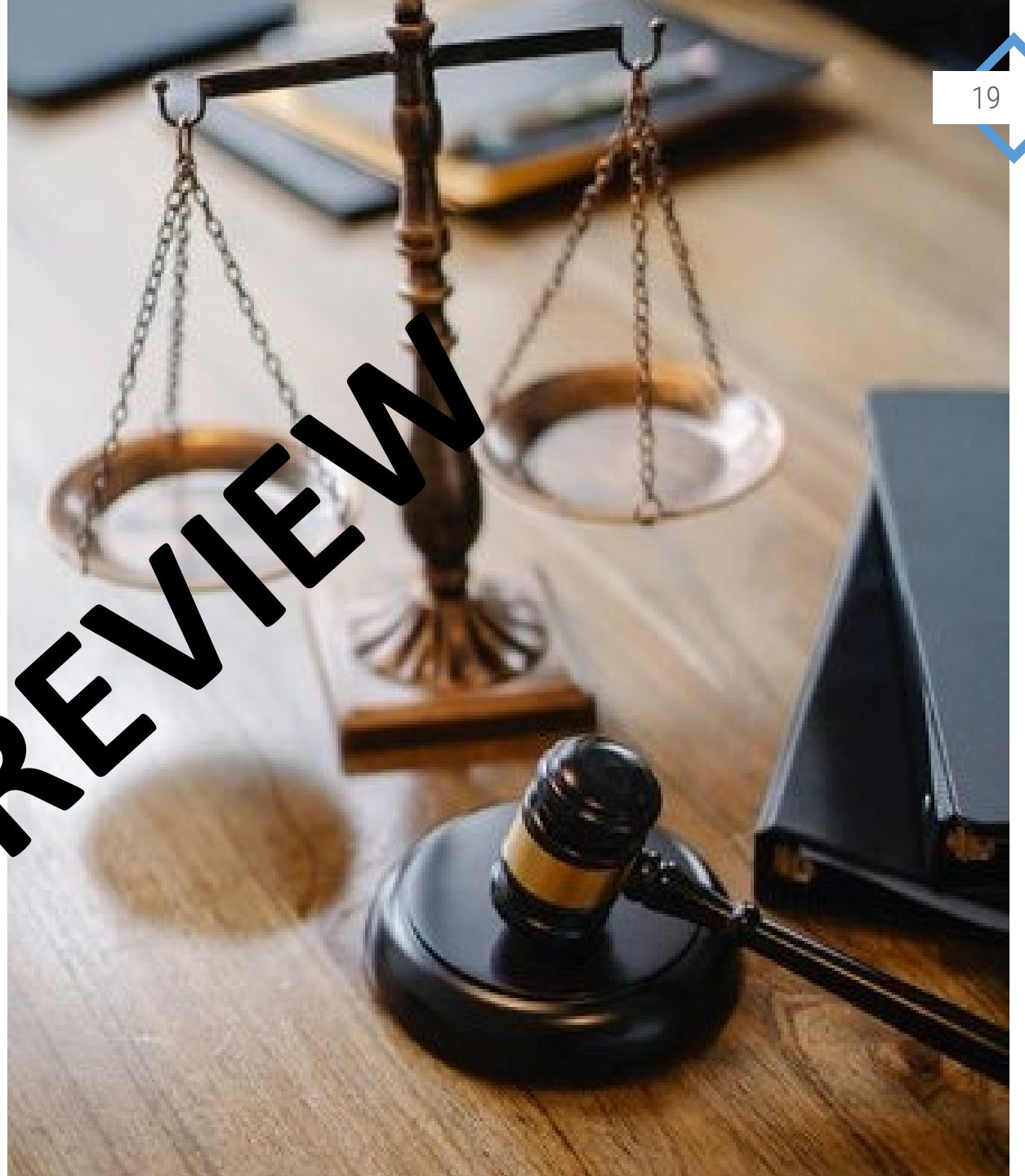


legacy or mess . . . ?

“The more dollars adult children receive, the fewer dollars they accumulate, while those who are given fewer dollars accumulate more.”

Stanley & Danko, *The Millionaire Next Door*, 1996

PREVIEW





**PREVIEW**

OUR ROLE...?



*but remember. . .*

**PREVIEW**

# “Happy Money”



YOUR  
NEXT  
MOVE





Please give us your feedback.

**PREVIEW**



# Book Your Appointment Now!

Don't worry  
about your  
health.  
It'll go away.

**PREVIEW**



**PREVIEW**

***Advisor's Name Here***

***Advisor's email address here***

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