PACIFIC
LEGACY LAW

Estate Planning Guide

@paclegacylaw

INTRODUCTION

WELCOME to the PACIFIC LEGACY LAW Estate Planning Information Guide

This Information Guide describes the Estate Planning briefly, and is not meant to be exhaustive. Additionally, this Guide is not legal advice, but rather educational.

The Guide should give you a general idea of what steps are required to draft and execute an effective Estate Plan.

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ESTATE PLANNING

7 STEPS

LEGACY

IT'S THE FUTURE

There are 7 primary steps to completing an Estate Plan. Our hope is that this Guide makes that process painless. Pacific Legacy promotes education over speed.

1. Organize & Understand
2. Choose Beneficiaries & Trustees
3. Complete Your Workbook
4. Draft & Sign
5. Fund Your Trust
6. Inform Your Trustee(s)
7. Review & Update

STEP 1

ORGANIZE & UNDERSTAND

Often, the task of where to start is daunting. Fear not, here are the four categories of information you need to prepare

- **Real Property**
  Tangible, Immovable Assets consisting of land or buildings. We need the Deeds for all real property.

- **Investments**
  IRA’s, 401k, 529s, Life Insurance, Securities and Business Interests. A list will be just fine.

- **Personal Property**
  Personal Physical Items like Furniture, Jewelry, Tools, Digital Assets and Bank Accounts. A list will be just fine.

- **Minor Children**
  Discuss how you will plan for children under 18, or those with disabilities or afflictions that require special help. The main question is WHO will protect these children if something happens to you.

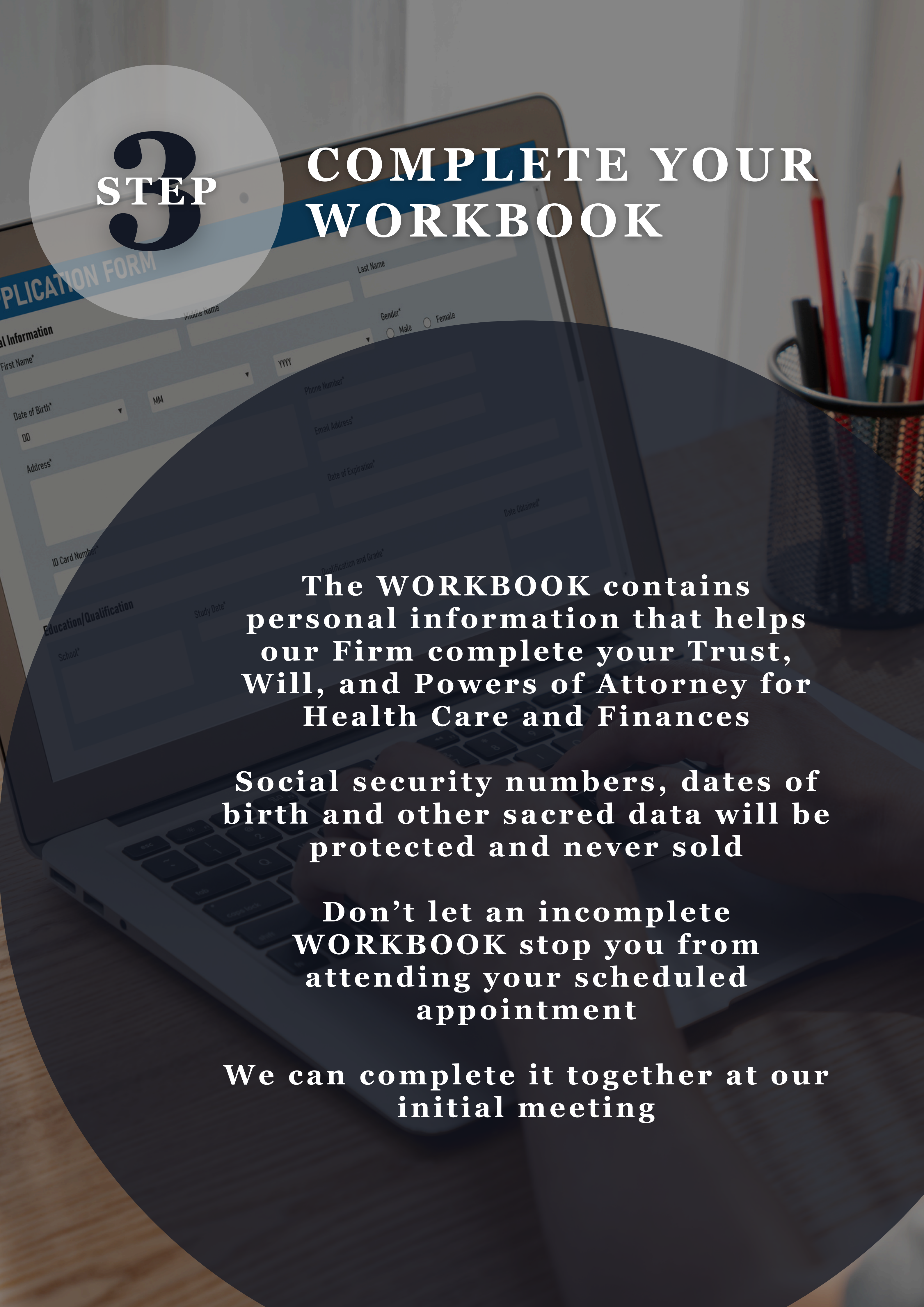
STEP 2 BENEFICIARIES & TRUSTEES

BENEFICIARIES will receive your assets upon your death

You can set TERMS and CONDITIONS on the timing of distribution as needed, or provide for a Special Needs Beneficiary without compromising their government benefits

TRUSTEES will manage your Trust and Estate upon your death or incapacity

You are the GRANTORS or TRUSTORS who made the Trust in the first place



STEP 3 COMPLETE YOUR WORKBOOK

The WORKBOOK contains personal information that helps our Firm complete your Trust, Will, and Powers of Attorney for Health Care and Finances

Social security numbers, dates of birth and other sacred data will be protected and never sold

Don’t let an incomplete WORKBOOK stop you from attending your scheduled appointment

We can complete it together at our initial meeting

STEP 4

DRAFT & SIGN DOCUMENTS

Every Complete Estate Plan comes with:

- **Trust**
  Legal Document where a third party Trustee manages assets on behalf of a Beneficiary upon death or disability
- **Will**
  Legal Document that authorizes an agent to make financial decisions in the case of death or disability
- **Financial Power of Attorney**
  Legal Document that authorizes an agent to make health related decisions in the event of death or disability
- **Health Care Power of Attorney**
  Legal Document that assigns an Agent to make health care decisions in the case of death or disability

STEP 5

FUND YOUR TRUST

Putting things into your Trust requires physically retitling assets in the name of the Trust. Each Type of asset is funded differently

- **Real Property**
  Real Property Assets are funded through deeds prepared by our Firm
- **Personal Property**
  Personal Property Assets are funded through an affidavit which is part of your Complete Estate Plan
- **Investments**
  Investment Assets are funded with the aid of a Financial Advisor who can prepare the correct documentation each investment vehicle requires

STEP 6

INFORM TRUSTEE(S)

INFORM your Trustee or Trustees where you have put your Estate Plan

PLACE your Estate Plan in a special and secure location only you and the Trustees know about.

KEEP digital copies on your phone, computer or I-Pad just in case

Ask about our Legacy Continuity Plans to keep your information secure, safe and accessible by the next generation

STEP 7

REVIEW & UPDATE

REVIEW your Estate Plan every three - five years for changes in law and personal situations

MEET with a Financial Advisor annually and follow a plan to financial freedom and retirement

A Good Financial Advisor will maximize returns, keep fees reasonable, and ensure that your goals and wishes are being met

TELL your friends and family how important planning for the future is

ENGAGEMENT & PAYMENTS

ENGAGEMENT with our Firm requires a formal discussion of price and an agreement to pay

Complete the WORKBOOK, attend your Free Consultation and we will get started on your matter straight away

WAYS TO PAY

Zelle

Venmo

POLICY

Our Firm requires a 50% upfront deposit and the remainder when the work is complete

We accept Venmo Zelle, All Major Credit Cards

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