

A premier solution at a cost you'll love.

Our hassle-free simple plan provides complete peace of mind by covering every essential aspect for your family, allowing you and your loved ones to feel secure knowing your affairs are properly in order.

The Plan

Revocable Living Trust

Control your money and belongings while you are alive, and decide who will get them after you die, without going through a lengthy court process.

Last Will & Testament

Control over the distribution of your assets after death instead of leaving it up to state intestacy laws.

Financial Power of Attorney

Appoint someone to handle your financial affairs and make decisions on your behalf if you become incapacitated or unable to manage your finances yourself.

Medical Power of Attorney

Appoint someone to make healthcare decisions on your behalf if you become incapacitated and unable to make those decisions yourself.

Deed + Mobile Notary

Transferring ownership of your real property into a living trust by deeding it to yourself as the trustee allows the property to avoid probate and pass directly to the trust's beneficiaries upon your death. **And a mobile notary who travels to meet our clients at their preferred location, such as a home, office, or other venue, to execute the estate plan documents and provide notary services with added convenience.**

Agent
Name:

Agent
Contact:

The Process

1

SCHEDULE A CONSULTATION

Here you meet an InheritGuard Legal Professional to be educated and informed about estate planning.

2

DESIGN YOUR PLAN

Working with your Legal Professional to design your plan, meeting your family's unique planning goals and needs.

3

REVIEW YOUR DRAFT

Our Legal Professionals will send your draft based on your answers to the intake questionnaire immediately after meeting, for your review.

4

DEED PREPARATION

Our team researches the property's title records using the address you provide, and prepares a new deed to transfer ownership of the property into your trust.

5

CONFIRM DRAFT & ASSIGN NOTARY

Confirm your draft is correct or requires revision and upon receiving confirmation our team assigns a notary.

6

SCHEDULE NOTARY SIGNING & FUND YOUR TRUST

Review signing, funding & recording instructions and schedule a signing and ensure you retitle assets to your trust.