

easy LEGAL PLANNING

When was the last time you did something dumb?

ESTATE PLANNING 101

DOING NOTHING

What happens if you choose to do no estate planning at all?



LAST WILL AND TESTAMENT

What is it and how does it work?



REVOCABLE LIVING TRUSTS

What they are and how they work.



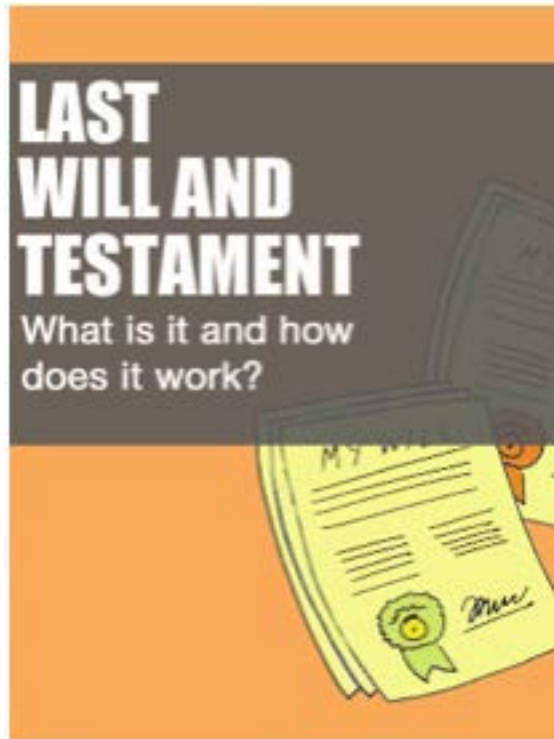
DOING NOTHING



If you die without doing any estate planning, then state law will decide what happens to the estate. This includes the expensive time-consuming probate process to determine what will happen to your assets.

1. Executor
2. Beneficiaries
3. Guardians for Minor Children

LAST WILL AND TESTAMENT



A Last Will and Testament or “Will” is a document that describes how you want your assets distributed after death.

1. Executor

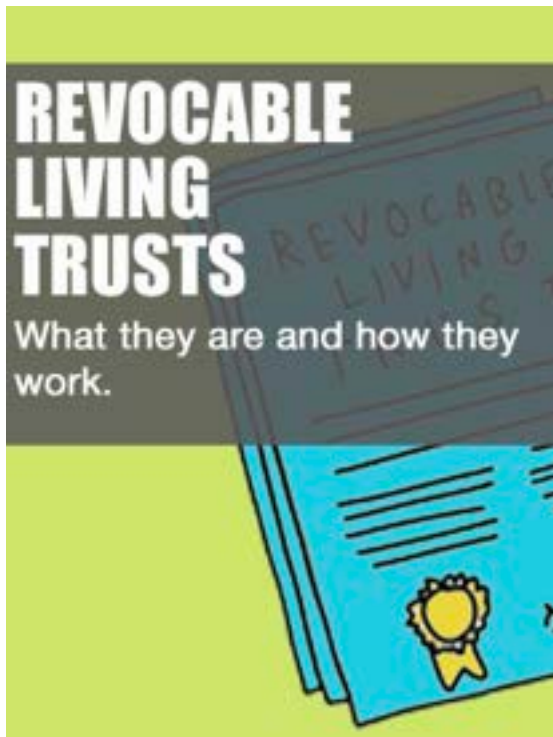
2. Beneficiaries

1. Guardians for Minor Children

A will has no effect during your lifetime. Only upon death does a Will become effective.

After death, you lose your signature. If you can't sign your assets over to the Executor, then the court must get involved (which is probate).

REVOCAABLE LIVING TRUST



Like a Will, a Revocable Living Trust is a document that describes how you want your assets distributed after death.

1. Successor Trustee

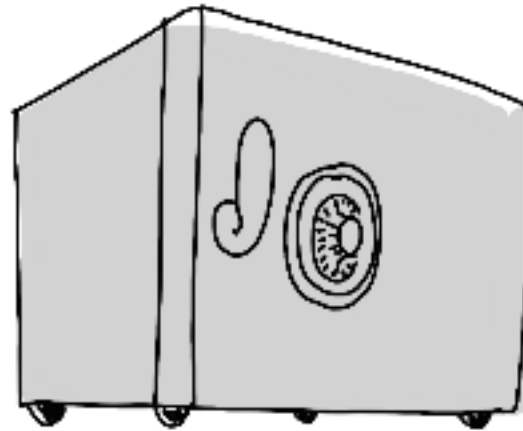
2. Beneficiaries

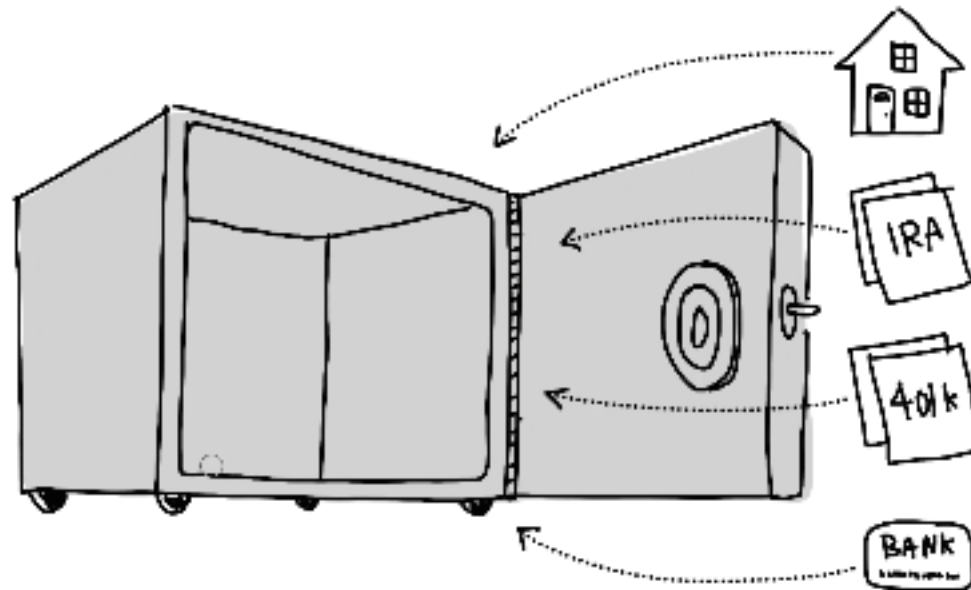
1. Guardians for Minor Children

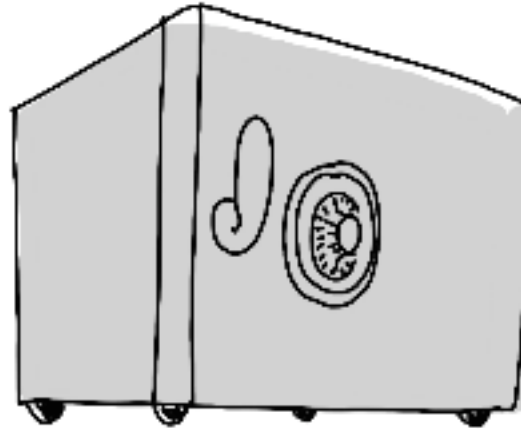
The difference is the trust takes effect while you're alive, and the trust can own assets (real estate, bank accounts, brokerage accounts, life insurance, etc.).

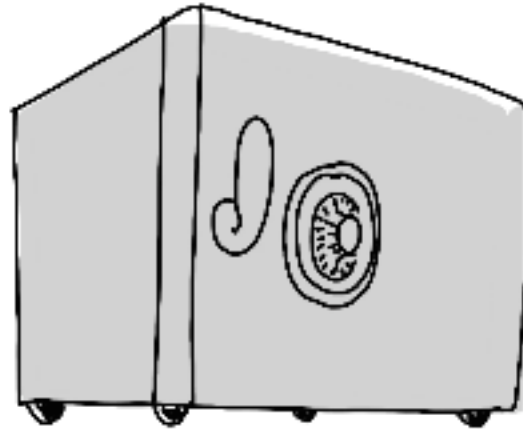
So, while you're alive (and still have your signature), you can start to transfer your assets into the trust.

After death, if all the assets have already been transferred into the trust, there is nothing for the court to probate.

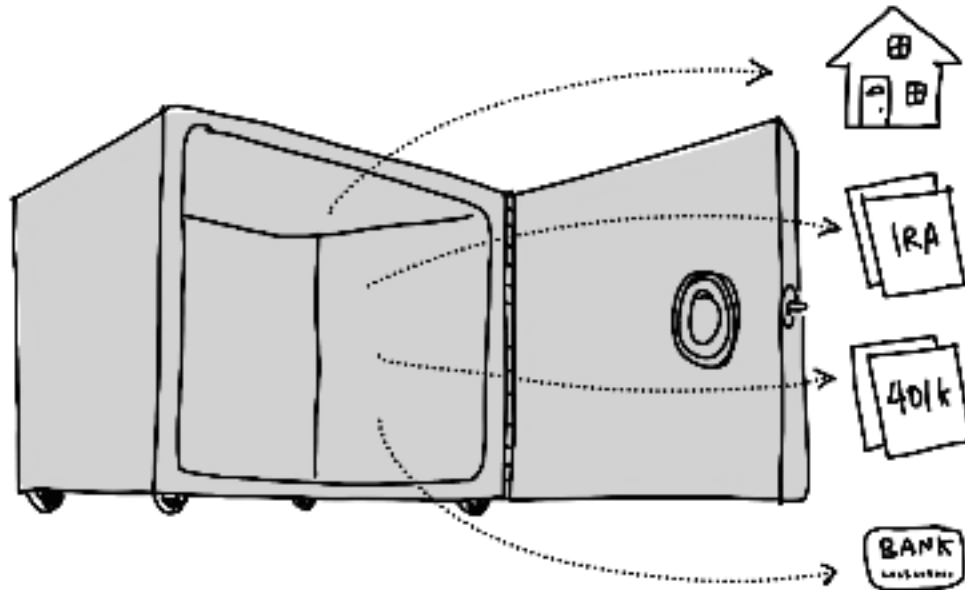








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ASK YOURSELF...

1. Do you have a proper estate plan in place?
 2. Is it current?
 3. If you have a Trust, is it properly funded?
-
1. Do your parents, children and loved ones have a proper estate plan in place?

\$595 FOR A COMPLETE REVOCABLE LIVING TRUST PACKAGE

This package includes 10 IMPORTANT DOCUMENTS...basically everything you need to cover all the bases.

Own or mortgage a home? You'll need a deed to transfer it to your trust. We can do that for you for an additional \$200.

[START THE QUESTIONNAIRE](#)

You'll start by filling-out our online questionnaire. It usually takes about 20 minutes.

And if you'd like more information first you can schedule a free phone consultation with one of our agents below:

[SCHEDULE A FREE PHONE CONSULTATION](#)

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