

Customized Estate Planning

Estate planning is one of the greatest gifts you can offer your family. With our guidance, you can gain peace of mind that your long-term care needs will be met, your assets will be protected for the benefit of the persons whom you choose, and your family will be protected should the unthinkable happen.

The Elite Plan

Family Protection Irrevocable Trust Based

The Essential Plan

Revocable Living Trust Based

Avoid the Government Controlled Court System

The Basic Plan

Will Based Estate Plan

- Last Will & Testament
- Supercharged durable power of attorney
- Living Will
- Health Care Power of Attorney
- HIPAA Release

Our Basic Plan Plus:

- Revocable Trust or Restatement (Designed to keep you out of court)
- Pour-over Will
- Protection for surviving spouse
- Sub-trusts to protect heirs, from divorce, creditors and bankruptcy.
- Special purpose trusts such as pet, equine or firearm trusts
- Contingent Supplemental Needs Trust Provisions
- Detailed incapacity plan designed to completely replace the court system
- Charitable gifting
- Tax planning
- Trust funding assistance
- One deed included

Our Essential Plan Plus:

- Family Protection Trust for protection from the costs of a nursing home or other long term care

or

- Veterans Trust to protect assets and allow Veterans to receive long-term care benefits provided by the VA
- Trust Protector provisions
- Multiple deeds & advanced funding