

Legacy Planning Services

How do you want to be remembered? How will you be remembered? If there is a difference in those answers, the following services may be helpful:

- Discovery of values-based goals (Who do you want to benefit and why? What do you want to happen?)
- Net Worth Statement
- Review of existing estate distribution including
 - Beneficiary Arrangements
 - Ownership Arrangements
 - Trusts
 - Wills
- Estate Flow Chart in both Assets and Value
- Analysis of current situation (What will happen?)
- Consideration of special needs
- Estate Tax Estimation
- Recommendations to consider
- Collaborative Referral to other professionals as needed resulting in:
 - Summary of Primary Estate Distribution Goals
 - Reviewed/Updated Will(s)
 - Reviewed/Updated Living Wills
 - Reviewed/Updated Trust Agreements
 - Reviewed/Updated Powers of Attorney
 - Correct Beneficiary Designations for Qualified Plans, IRAs, Roth IRAs, Life Insurance, Annuities, etc.
 - Correct Ownership Arrangements on accounts, property, business, and other assets
 - Reviewed/Updated Business Agreements for disposition of business interests in the event of
 - Disability
 - Divorce

- Retirement
- Death
- Business failure
- Hostile takeover
- Natural disaster or Man-made disaster
- Establishment of final arrangements so survivors don't have to in their time of grief
- Appropriate communication with Trustees, Executors, and Guardians prior to a triggering event including:
 - Conceptual understanding of primary goals
 - Review, understanding and acceptance of rolls and responsibilities
 - Cooperation on a plan of action to work together towards the primary family legacy objectives

Tomorrow is not guaranteed. Why not verify today that your plan will work out as you want it to by completing our secure online confidential questionnaire so we can schedule a time to meet and discuss who and what is important to you at this time?

After you have submitted your questionnaire, we will contact you to schedule a 60-minute complimentary consultation to determine what your needs are, how we might work together, and if our relationship is the right fit for you. Upon mutual agreement, we will either continue working with you or refer you to other appropriate professionals.

Your ultimate success is up to you, and is our greatest desire. We look forward to hearing from you soon!