The Customized Protective Estate Planning Solution™

A Unique Estate Planning Process that Protects and Provides for You, Your Loved Ones, and Your Legacy™

1. The First Step™

We **gather** and **review** your information and your existing Estate Plan prior to our first meeting. Our Unique Goals & Concerns Identifier™ helps you focus. We are well **prepared** and efficient in our first meeting.

2. The Estate Concerns & Goals Conversation™

We will work together to identify all of your assets and the strengths and weaknesses of your loved ones. From our 35 years of legal experience we help you **understand** how Estate Planning works, how we would **protect** and provide for you and your loved ones, and avoid **Taxes** and **Probate** Costs as together we design your Individual Customized Protective Estate Plan™.

3. Protecting You & Yours™

Together we design your Individual Customized Protective Estate Plan™ to keep you in control if you become **Mentally Disabled**. We plan to protect the surviving spouse in the event of a car wreck **lawsuit or remarriage.** We plan to keep your assets in your family. We plan to protect your loved ones or children in the event they are in a car wreck **lawsuit** or a **divorce**. We plan for Special Needs and Addiction as needed. We can plan to protect your children from **squandering** their inheritance. We may plan for grandchildren or to provide college education.

4. Tax & Probate Avoider™

As part of our Individual Customized Protective Estate Plan™, we plan to avoid or limit the very expensive Estate **Taxes** and Capital Gains Taxes. We also plan to avoid the expense, delay and publicity of **Probate** Court. This includes **Court Costs** that can be up to $6,000 per person, or $12,000 a couple. Administrative fees can be 7% of your total Estate. Average Probate Court time can be 18 – 24 months.

5. Activating the Plan™

At our signing meeting you and Attorney Steven Andrew Jackson review in detail your Individual Customized Protective Estate Plan™ so that you understand your Plan and see that it meets your Goals. We **review** all the **Protections** built in for you, your spouse and your loved ones. We fine tune any **modifications** to better protect and provide for your loved ones. Together we review how the Tax and Probate Avoidance Planning works for your particular Individual Customized Protective Estate Plan™.

6. Coordinating with Advisors™

We **coordinate** with your other professional **advisors:** Financial Advisors, Certified Financial Planners, Accountants, Insurance Professionals and other Attorneys or professionals that you want us to communicate with. That way your team works **together** on your behalf.

7. The Retitling Process™

We work together to **retitle** your property into your Trust so that you have the advantages of having **Control** and **Protection** for you and your loved ones and also to avoid unnecessary delays and costs of Estate Taxes and Probate Costs.

8. The Legal Update Process™ *The Lifeplan System™*

In our Formal Legal Update Program, entitled *The Lifeplan System™,* we work together with you to keep your Individual Customized Protective Estate Plan™ **current** as the **law changes**. The law will change. We also have exclusive **classes** for **you** and **your loved ones** to review how your Customized Protective Estate Plan™ works. This will refresh you on your Plan and teach your helpers their role. We know the law will change, what you own will change, and your relationships will change. Our Formal Legal Update Program – *The Lifeplan System™* works with you to keep your Customized Protective Estate Plan™ current with those changes. That way we can continue to Protect and Provide for you and your loved ones, Avoid Burdensome Taxes and Probate Costs and keep you in Control.

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