How It Works…

YOUR ESTATE

IN-DEPTH FACT FINDING

ASSET REVIEW
- Bank Accounts
- Investments
- Business Interests
- Life Insurance
- Pension Benefits

TRANSFER METHODS
- Jointly-Held Property
- Community Property
- Beneficiary Designations
- Wills and Trusts
- Buy-Sell Agreements

CURRENT ESTATE PLAN

GOALS AND OBJECTIVES
- Income Needs at Death
- Cash Needs at Death
- Retirement Income Needs
- Capital Accumulation Needs
- Asset Protection Needs
- Educational Funding
- Charitable and Gift Giving

To Achieve Goals and Objectives

PLANNING ALTERNATIVES

PROPOSED ESTATE PLAN

To Minimize Costs and Taxes

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