SERVICES | Estate Planning

LEVEL 1: ESSENTIALS PLAN

Our Essentials Plan is designed with fundamental estate planning in mind. It covers basic protections for you and your loved ones in case of incapacity or death. You will be able to influence who will make medical, financial, and other personal choices on your behalf. You will also be able to control important estate decisions that would otherwise be left to chance. If you are looking for a simple but comprehensive estate plan, you found it.

Ideal for:

- Planning for incapacity
- Expressing end-of-life wishes
- Protecting minor children
- Naming your executor
- Transferring modest estates
- Protecting pets

Includes:

- Will
- Standby Guardianship Choice
- General Power of Attorney
- Medical Directives
- HIPAA Waiver

LEVEL 2: TRUST PLAN

Our Trust Plan offers the same fundamental protections covered in level 1, with the added benefits of a revocable living trust. In general, trusts achieve a broader range of estate planning goals while reducing or eliminating the time, expense, and overall burden that normally accompany a disability or death. This plan is great if you want a straightforward solution that better ensures everything will run as smoothly and efficiently as possible for your loved ones.

Ideal for:

- Enhancing incapacity plan
- Minimizing or avoiding probate
- Holding non-NC real estate
- Transferring unique assets
- Maintaining privacy
- Sidestepping an estate contest

Includes everything in the Essentials Plan plus:

- Revocable Living Trust
- Certification of Trust
- Basic funding instructions

LEVEL 3: LEGACY PLAN

Our Legacy Plan provides the protections and benefits found in levels 1 and 2. Sometimes, though, planning considerations exist that go beyond what an Essentials Plan or Trust Plan can accommodate. When special attention is needed, this plan is an ideal choice. It can be designed to cover a wide range of circumstances so your particular interests receive the desired level of care.

Ideal for:

- Transferring substantial assets
- Protecting significant assets
- Protecting a blended family
- Planning for long-term care
- Planning a business succession
- Minimizing taxes

Includes everything in the Trust Plan plus:

- Additional instruments, customized based on your circumstances and interests

ADD-ONS

Our firm can also assist with:

- Recording powers of attorney and medical directives
- Updating beneficiary designations
- Funding trusts
- Facilitating family and fiduciary meetings
- Administering estates and trusts

Additional fees apply.

PEACE OF MIND

All plans include post-signing guidance, stored copies, periodic check-ups upon request, and a free postmortem fiduciary meeting. Plus, think of us as your trusted advisors to help you stay on the right path as you experience life's twists and turns.