ESTATE PLAN LEVELS

LEVEL ONE
Family Plan

The Family Plan is for clients who want to guarantee that their minor children are well-cared for and raised by the people they want no matter what, that their healthcare wishes are turned into directives and that their financial affairs will be taken care of if they become incapacitated. This plan is appropriate for a family who has not yet accumulated assets which would need long-term protection.

YOUR FAMILY PLAN...

Begins with our Unique Propriety System to protect your children, which goes far beyond merely naming permanent guardians. You will have peace of mind knowing that your children will never spend a single minute in foster care should something happen to you. Plus, the plan also provides detailed instructions for the people who will be caring for your children.

Includes basic Wills, Durable Powers of Attorney and Healthcare Directives.

Empowers persons of your choosing to manage your affairs if you become incapacitated.

LEVEL TWO
Trust Plan

The Trust Plan is for the clients who want the total assurance and peace of mind of knowing that in the event of their death or incapacity, all assets will be transferred to heirs, including any Special Needs beneficiaries, with the most ease and convenience possible in the privacy of our own office and thereby avoid the time and expense of the Probate Court process. Clients choosing this plan may also opt to protect their beneficiary's inheritance from creditors, lawsuits, spouses, estate taxes and the loss of government benefits.

YOUR TRUST PLAN...

Is a trust-based plan that gives you the peace of mind of knowing that we are here for your family in the event of your death or incapacity, so they know just where to go and what to do.

Also includes Pour-Over Wills, Healthcare Directives, and Powers of Attorney so that you know that you are well taken care of in times of incapacity.

All asset transfers will be handled by you, with unlimited guidance and support from us. The Kids Protection Plan may also be included to ensure your children are never taken from your home and are always raised by the people you want.

Protects your loved ones from losing their inheritance to divorce, lawsuits, immaturity, and estate taxes (optional).

Safeguards any special needs beneficiaries; access to benefits (optional).

LEVEL THREE
Wealth Plan

The Wealth Plan is for clients who want all of the protections of the Trust Plan AND the peace of mind of knowing that our office has taken care of all asset transfers to your trust. This plan is appropriate for busy families who want to expend the least amount of effort while experiencing the greatest level of convenience, care and service. WE DO IT ALL FOR YOU!

YOUR WEALTH PLAN...

Includes everything that comes standard with the Trust Plan and is just as upgradeable.

PLUS we analyze how each of your assets is titled or designated.

Gives you the comfort of knowing that all transfers to your trust and beneficiary designations are completed accurately and timely.

Means maximum protection for you and your loved ones.

LICHTERMAN LAW, PLC
Attorney & Counselor at Law

5252 Clyde Park Ave. SW, Suite A
Grand Rapids, MI 49509
(616) 827-7596 · www.lichtermanlaw.com

*The above plans include the transfer of one piece of Michigan real estate into the trust if recommended. Additional real estate funding may involve a supplementary charge.