

ESTATE PLAN LEVELS

LEVEL ONE Family Plan

For the Family Who doesn't have concerns about their assets going through the court process called probate, but does want to make sure their minor children are cared for by who they want in the way they want. Their health care wishes are turned into directives, and their loved ones are able to access their assets using a durable power of attorney if they become incapacitated.

Your Family Plan...

Is a will-based plan that provides the peace of mind of knowing we are here to help you navigate the system during life and for your family after you are gone.

The Family Plan also includes Patient Advocate Designations and Enhanced Durable Powers of Attorney so that you know that you are well taken care of if anything happens. It also includes a Children Protection Plan to help ensure that, if something happens to you, your children will be raised by the people you want and in the way you want and will not end up in the arms of strangers.

Also included is one Priceless Conversation of your choice to help ensure your family benefits from your values, insights, stories, and experiences.

LEVEL TWO Trust Plan*

For the Family Who wants the total assurance and peace of mind of knowing that what they have will be transferred to their heirs with the most ease and convenience in the privacy of our office without court involvement. Clients choosing the Trust Plan may also opt to protect their beneficiaries' inheritance from lawsuits, divorces, and estate taxes.

Your Trust Plan...

Is a trust-based plan that provides the peace of mind of knowing we are here to help you navigate the system during life and for your family after you are gone.

The Trust Plan also includes Pour-Over Wills, Patient Advocate Designations, and Enhanced Durable Powers of Attorney so that you know that you are well taken care of in addition your assets.

All asset transfers will be handled by you with guidance and support from us as needed. The Children Protection Plan may also be included to help ensure that, if something happens to you, your children will be raised by the people you want and in the way you want and will not end up in the arms of strangers.

Also included is one Priceless Conversation of your choice to help ensure your family benefits from your values, insights, stories, and experiences.

LEVEL THREE Pinnacle Plan*

For The Family Who wants the assurance and peace of mind of the Trust Plan AND all the comfort of knowing that asset transfers have been taken care of by our office.

This plan is appropriate for busy families who want the least amount of time-consuming effort and the greatest amount of convenience and care.

WE DO IT ALL FOR YOU!

Your Pinnacle Plan...

Includes all the components of the Trust Plan, PLUS we analyze how each of your assets is titled or designated.

We prepare an asset spreadsheet confirming what you own and how it is held and then complete all of the forms and requests necessary to transfer every asset and designate every beneficiary for the maximum protection of your family and your assets.

LEVEL FOUR Beyond the Living Trust

For those in need of advanced estate planning techniques, our planning process begins by implementing one of the above foundational plans to create a solid estate planning foundation for your family. Once you have a plan in place, we are happy to work with you and your family to implement advanced estate planning and asset protection techniques to further protect your family and/or business.

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