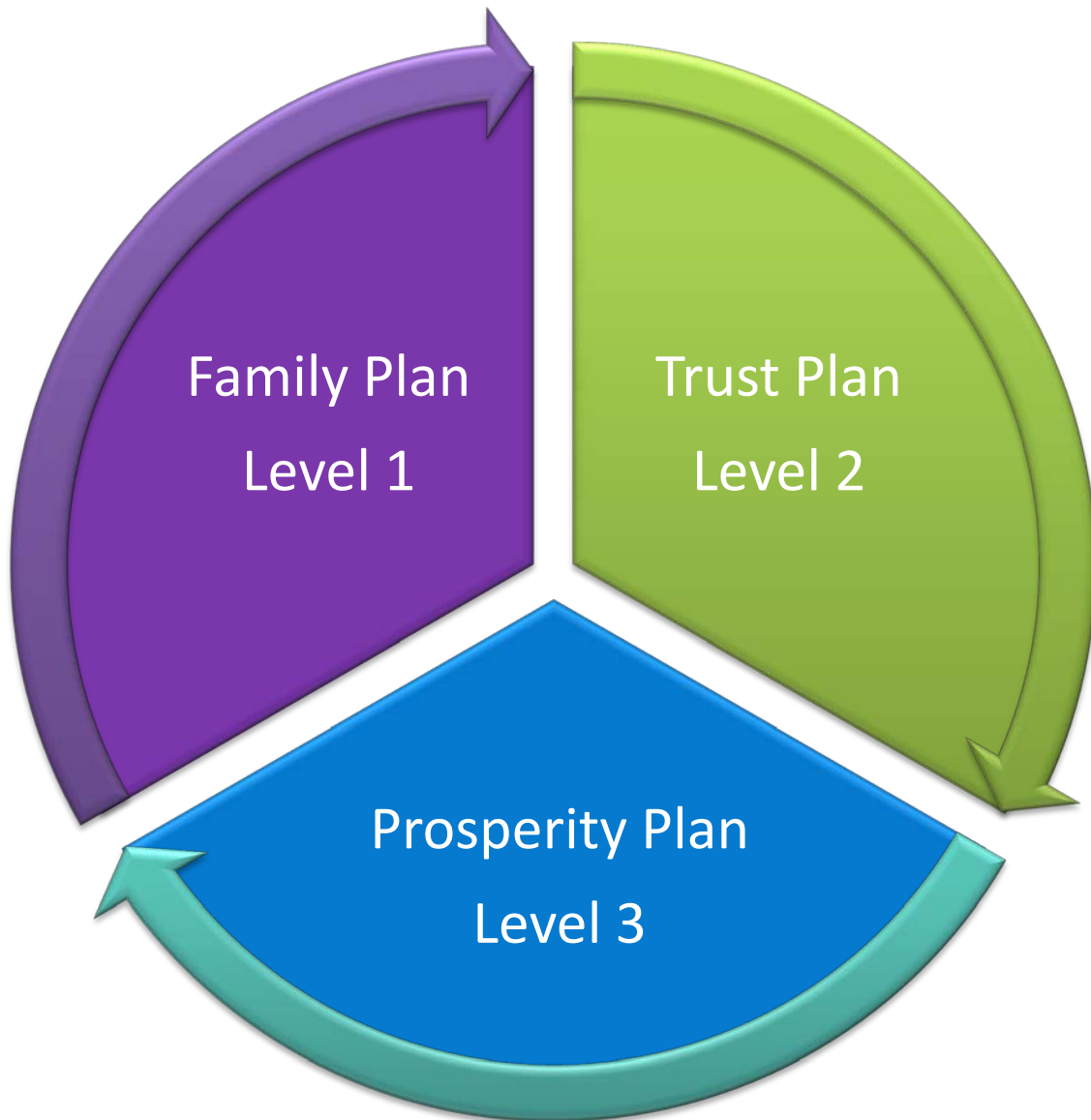


WE OFFER A BROAD RANGE OF PLANNING LEVELS SO THAT WE CAN FULFILL EACH CLIENT'S  
INDIVIDUAL NEEDS, PROVIDING PERSONALLY TAILORED SERVICE.



FOURTH DIMENSION...BEYOND THE REVOCABLE TRUST

Our firm is dedicated to protecting you and your loved ones, and being a trusted advisor you can turn to for all of your life transitions. By working with us, you'll have tremendous peace of mind knowing that you've made the best possible legal decisions for yourself and those you love. You'll also know that your loved ones will be in warm and capable hands should something ever happen to you.

Every plan starts with a foundational plan to provide you with peace of mind, keep you in control, and protect your loved ones. The foundational plan focuses on probate avoidance, incapacity planning and guardian planning, and may also provide asset protection for your beneficiaries. Plans for large and/or complex estates will need additional advance planning beyond the foundation to reduce or minimize taxes, tackle the complexities of business succession, and provide multi-generational planning.

Each plan is highly customized to meet your unique family situation, assets, and personal goals and values. While it is impossible to detail your unique plan, described below is an outline of our typical comprehensive packages. Although our foundational estate plan is described as a list of documents, in creating an estate plan you are not just "buying paper."

When you retain an attorney whose practice focuses on planning, you are choosing an advisor who will create a plan with you based on your unique situation and needs and upon whom your loved ones will depend at their most difficult times. You are creating a relationship with your attorney that should last for life.

#### FAMILY PROTECTION PACKAGES TYPICALLY INCLUDE:

- Personal service with Candice N. Aiston so that all questions are answered and help is provided, with no additional cost. Candice explores your unique concerns to craft a solution that addresses them.
- A Revocable Living Trust, which eliminates probate and the need for conservatorship proceedings with respect to all assets transferred to the trust. This trust distributes your assets to your chosen beneficiaries when you want and in the way you want.
- For married couples who want to minimize estate taxes or provide asset protection to one another, our carefully drafted spousal protection trusts can do more than meet the minimum legal requirements to minimize estate tax; we can build a vault that ensures your children and spouse will be protected from lawsuits and unintentional disinheritances due to remarriage.
- Children's trusts to ensure the assets you leave for your children are protected from lawsuits or children's divorces. These trusts can also be designed to preserve assets for generations.
- Will(s) that ensure all property is transferred to the chosen beneficiaries, even if an asset is not transferred to your revocable living trust during your lifetime.
- Thoughtful incapacity planning to ensure that you are protected in the event you become unable to manage your affairs for any period of time. Incapacity is an often overlooked major risk for everyone, regardless of age.
- Customized Durable Power of Attorney that allows your spouse or other trusted person to sign documents and handle financial matters for you if mental disability prevents you from managing your own affairs.
- Advance healthcare directive(s) that give directions to physicians and family members regarding continuation of life support systems and other medical treatment preferences.

# PROTECTION PACKAGES

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- A handy wallet card enables you to get assets transferred into your trust by simply filling the institution's forms with your trust's information on the card, and delivering the form to the appropriate institutions.
- The *Kids Protection Plan*<sup>™</sup> to protect your minor children includes:
  - *Comprehensive Nomination of Guardians* for minor children that is effective during your lifetime (in case you become incapacitated) and not just upon your death. We name short- and long-term guardians so your kids will never be cared for by strangers.
  - *Confidential Exclusion* of potential guardians to protect your children from relatives who would be poor or dangerous guardians.
  - *Instructions to Guardians* where you can provide essential information about your child's needs.
  - *Healthcare Power of Attorney for Minor* so that trusted caregivers can authorize healthcare for your minor children if you are unavailable.
  - *Wallet ID card* that identifies you as a parent with minor children and gives contact info for your guardians.
- Letters to all of the people you have named as guardians, trustees, or other key positions explaining to them the honor, responsibility, and definition of their role in your plan. The letters also share where to find your documents when they are needed.
- Letters to people who care about your child with special needs advising them of the creation of your child's Special Needs Trust and how to avoid inadvertently harming the child in their own estate plan.
- Fill-in-the-blank Memorial Instruction forms to express your preference and protect your family from over-spending or suffering from uncertainty about your wishes after your death.
- An Estate Planning Portfolio binder that contains your planning documents as well as informational documents and forms that can be completed regarding where assets are located, as well as a CD with all of your documents making it easy to create copies to share with your loved ones.
- All future communication about your estate plan is included. You never have to worry about getting a bill in the mail after you call our office.
- A free plan review every three years. You'll always know that your plan is up-to-date and that it will work for your family when your family needs it.
- The opportunity to join our *Family Wealth VIP*<sup>™</sup> membership, for a small monthly fee. The membership allows you to receive additional services on a regular basis, including legal advice on matters beyond your current estate plan, unlimited amendments to your documents for any reason at any time (additional charge only to add additional trusts), annual plan review, heavy discounts on any legal services we can provide, and access to our network of other legal specialists. In addition, we have special membership programs for our clients with businesses and complex planning needs.

# THREE LEVELS OF PLANNING

*Our thoughtful estate planning packages provide varying levels of protection, suited to your unique needs and goals.*

## LEVEL ONE THE FAMILY PLAN

The Family Plan is for clients who want to guarantee that their minor children are well cared-for 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. The plan is appropriate for young families with minor children that do not own a home or have more than \$50,000 in assets.

## LEVEL TWO THE TRUST PLAN

The Trust Plan is for clients who want real peace of mind knowing that in the event of their death or incapacity, their assets will go to their loved ones easily, without unnecessary court costs or lawyers' fees. Clients choosing the Trust Plan may also choose to protect their loved ones' inheritance from being lost to divorce, lawsuits, immaturity, and estate taxes.

## LEVEL THREE THE WEALTH PLAN

The Wealth Plan who want all 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 FAMILY PLAN...

- Starts with our *Kids Protection Plan*<sup>™</sup> to protect your children, which goes far beyond 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 and Healthcare Directives.
- Empowers persons of your choosing to manage your affairs if you become incapacitated.

### 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.
- Includes Wills, Healthcare Directives, and Powers of Attorney so that you know that you are well taken care of in the event of incapacity.
- Protects your family from the nightmare of an expensive, lengthy, and public probate process.
- Protects your loved ones from losing their inheritance to divorce, lawsuits, immaturity, and estate taxes. (optional)
- Keeps your separate property from being lost in a lawsuit, second marriage or divorce if your spouse outlives you. (optional)
- Safeguards any special needs beneficiaries' access to benefits. (optional)

### YOUR WEALTH PLAN...

- Incorporates everything that comes standard with a Trust Plan and is just as upgradeable.
- PLUS analysis of how your assets are titled or designated.
- Gives you the comfort of knowing that all of the transfers to your trust and beneficiary designations are completed accurately and timely.
- Means maximum ease and protection for you and your loved ones.

\$2,000

\$4,000 - \$6,000

\$6,000 - \$8,000