

Custom Build the Right Plan for You and Your Loved Ones

<u>FEATURES</u>	<u>BASIC</u>	<u>STANDARD</u>	<u>PREMIUM</u>
Living Trust (Basic has outright distributions only and same distributions for both spouses)	✓	✓	✓
Pour-over Will(s)	✓	✓	✓
Property Agreement (if married)	✓	✓	✓
Deed, Transfer Letters and Assignment (may be additional charge for extra deeds)	✓	✓	✓
Durable Power of Attorney (including latest Medi-Cal planning provisions)	✓	✓	✓
Advance Health Care Directive	✓	✓	✓
HIPAA Authorization	✓	✓	✓
Notarization and Storage of Copies	✓	✓	✓
Free Attorney Consultation Every 3 Years	✓	✓	✓
Free Consultation with Trustee at Death	✓	✓	✓
Sign With an Attorney	✓	✓	✓
Protective Trusts for Heirs (Personal Asset Trust SM)		✓	✓
Health Document Emergency Card		✓	✓
Owner's Manual and "ID Card"		✓	✓
Retirement Trust			✓
Successor Trustee Manual			✓
Personal Asset Trust SM User Manual			✓
Price	<u>BASIC</u>	<u>STANDARD</u>	<u>PREMIUM</u>
Single	\$2,495	\$3,595	\$5,095
Married	\$3,095	\$4,495	\$6,295

NOTE: Other advanced level Estate Tax and Asset Protection planning quoted separately.

Successor Trustee Manual (with Basic or Standard plan) \$150 each.

Would You Like a Discount?

\$800 Off If You Come In Before Oct. 30, 2015

	<u>BASIC</u>	<u>STANDARD</u>	<u>PREMIUM</u>
Single	\$2,495	\$3,595	\$5,095
	<u>-800</u>	<u>-800</u>	<u>-800</u>
	\$1,695	\$2,795	\$4,295
Married	\$3,095	\$4,495	\$6,295
	<u>-800</u>	<u>-800</u>	<u>-800</u>
	\$2,295	\$3,695	\$5,495

- What if I don't need a Living Trust?
Special Will Package \$975 / (\$1,175)
- We accept credit cards and offer payment plans

REMEMBER...

YOU ONLY GET

THE \$800 DISCOUNT

IF YOU...

1. Fill out and turn in the *Response Form*
2. *Make Your FREE Appointment* before you leave
3. Come in and see us before: Oct. 30, 2015