

HOW TO PROTECT YOUR KIDS, AVOID COURT AND MINIMIZE TAXES WITHOUT LEAVING THE HOUSE



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— EXPERIENCED • LOYAL • HONEST —

How To Protect Your Kids, Avoid Court, and Minimize Taxes Without Leaving the House

Why did you decide to come to this meeting today?

There are three main options for estate planning:

1. _____
2. _____
3. _____

INTESTATE SUCCESSION

- Everyone has this estate plan already.
- Utah Code Title 75 Chapter 2 Part 1
- Per Capita at Each Generation _____
- Heirs must go to Court
- No nominated administrator
- Proceedings are Public
- No Guardian Election for children
- Process lasts minimum 3 months and up to 12 months plus
- Court Fee (Filing Fees) _____
- Attorney Fees _____
- Does not Include Health Care, Power of Attorney, or Funeral Planning

WILL

- You start to take control of your estate
- More flexibility in gift options
- Nominate a Personal Representative
- May Nominate Guardian for Children
- Must still go to court
- Proceedings are still public
- Probate takes at least 3 months but up to 12 months plus
- Court Fee (Filing Fee) _____
- Attorney Fees _____
- Attorney Setup Fees _____

TRUSTS

- By far the _____ flexible and customizable option
 - Tax Planning Strategies
 - Flexible Gift Options
 - Choose Trustee and backup
 - Provide for Disabled child
 - Can be distributed as soon as allowed by terms of trust
 - Nominate Guardian for minor or disabled child
 - Limit gifts if heir suffers from addiction or other issues
 - Elect a trustee to manage trust for minor children
 - Proceedings are completely _____
 - _____
 - Attorney Setup Fee
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LOOK AT REASONS FOR JOINING THIS MEETING THAT YOU WROTE AT THE TOP OF PAGE 1

Benefits of Trust that solve your reasons for joining this Meeting:


- _____
- _____
- _____
- _____
- _____

WE CAN HELP YOU:


- Get a comprehensive Trust Plan
- So that you can keep your family out of court
- WITHOUT inconvenient meetings at an attorney office and
- WITHOUT breaking the bank or even leaving your house
- So you can stop worrying and live your life to the fullest!

THE PROCESS IS SIMPLE:


ESTATE PLAN In 4 Easy Steps




Sign Up For Design Meeting





Fill Out Questionnaire - Design Meeting



Watch Estate Plan Explanation Video from Attorney



Sign Estate Plan



THE NEXT STEP IS SIMPLE:

- Click the **link** on your screen to schedule a Discovery Meeting.
- Fill out the questionnaire that is sent to your email.
- You will meet with me via Google Meet on the date and time you choose, and we will plan your estate together.