The Planning Levels

3

2

1

PASADENA
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LEVEL 3 LEGACY PLAN

LEVEL 2 FAMILY PLAN

LEVEL 1 ESTATE PLAN

Three Levels of Planning

Level One	Level Two	Level Three
1	2	3
This is for people who want to efficiently transfer assets after death and ensure that the people of their choosing will care for their loved ones and beneficiaries. With Level One Planning you can also choose to have us coordinate your assets with your estate plan.	This includes everything in Level One Planning as well as the additional protections afforded by naming guardians of your minor children and inheritance or special needs planning for the assets your beneficiaries will receive.	This includes all the benefits of Level Two Planning and provides the ability to pass your values and financial legacy to grandchildren, future generations and society.
Your **Estate** Plan... Includes a Revocable Living Trust and related documents such as wills, powers of attorney, and healthcare directives. In addition, it can avoid the expense, delay and public nature of the probate process when transferring your assets to your beneficiaries. In the event of your incapacity, your affairs can be privately managed by the people you choose.	Your **Family** Plan... Incorporates everything included in Level One Planning plus lifetime asset protection for your surviving spouse and beneficiaries. A carefully drafted statement of your values and hopes for the future will guide your beneficiaries and executors. If you have loved ones with special needs, your family plan can ensure they continue to receive needed services. In addition, your children's inheritances will be protected from lawsuits and divorce.	Your **Legacy** Plan... Includes all the benefits and protections provided by Levels One and Two, yet goes far beyond those levels. It can include specific, extensive and detailed directives for the distribution and stewardship of your family values and financial assets…directives that will govern the substantially larger inheritance your family will receive through generation-skipping transfer tax planning. In addition, your Legacy Plan can include charitable planning strategies and tools to provide a philanthropic inheritance for your family. Lifetime gifts to children can also be leveraged into asset-protected legal safety nets.
$4,500-$8,500	$6,000-$15,000	$8,500 - $30,000+

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