

ASSET PROTECTION PLANNING LEVELS



1



THE PADLOCK

2



THE SAFE



3

THE VAULT

Level One Asset Protection Planning includes designing and creating the appropriate entity for operation of your business to best protect your personal assets, while providing you with appropriate tax and business planning.

\$3,500-\$10,000

Level Two Asset Protection Planning incorporates all the aspects of Level One planning, but wraps your business and personal assets in additional layers of protection in forms that are appropriate for your needs. This might include creation of retirement and deferred compensation plans and irrevocable trusts such as qualified personal residence trusts and domestic asset protection trusts.

\$6,500-\$30,000

Level Three Asset Protection Planning incorporates all the benefits of Levels One and Two while providing you with the most stringent and effective asset protection tools available through offshore trust planning.

\$25,000-\$60,000