

PROPOSED AGENDA FOR THE INITIAL ESTATE PLANNING VISIT

I. General Information

- a. The purpose of this meeting is to discuss your estate planning needs and desires.
- b. How long the meeting should last: one to three hours
- c. Review of **The Definition of Proper Estate Planning** and **The Planning Pyramid**

2. Initial review of your personal data and your financial information in **The Estate Planning Information**

3. Discuss your hopes, fears, dreams, values, aspirations, goals, and objectives; **WHAT IS IMPORTANT ABOUT ESTATE PLANNING TO YOU!**

4. Designing the plan to meet your goals and objectives (At the Whiteboard)

- a. Detailed analysis of your present plan (or state provided plan)
- b. The designing of your proposed new plan

5. Discuss **The Ashcraft Firm Estate Planning Process**

6. Further Concerns:

- a. Do you have any worries or concerns that we did not address?
- b. What do you like about your new plan?

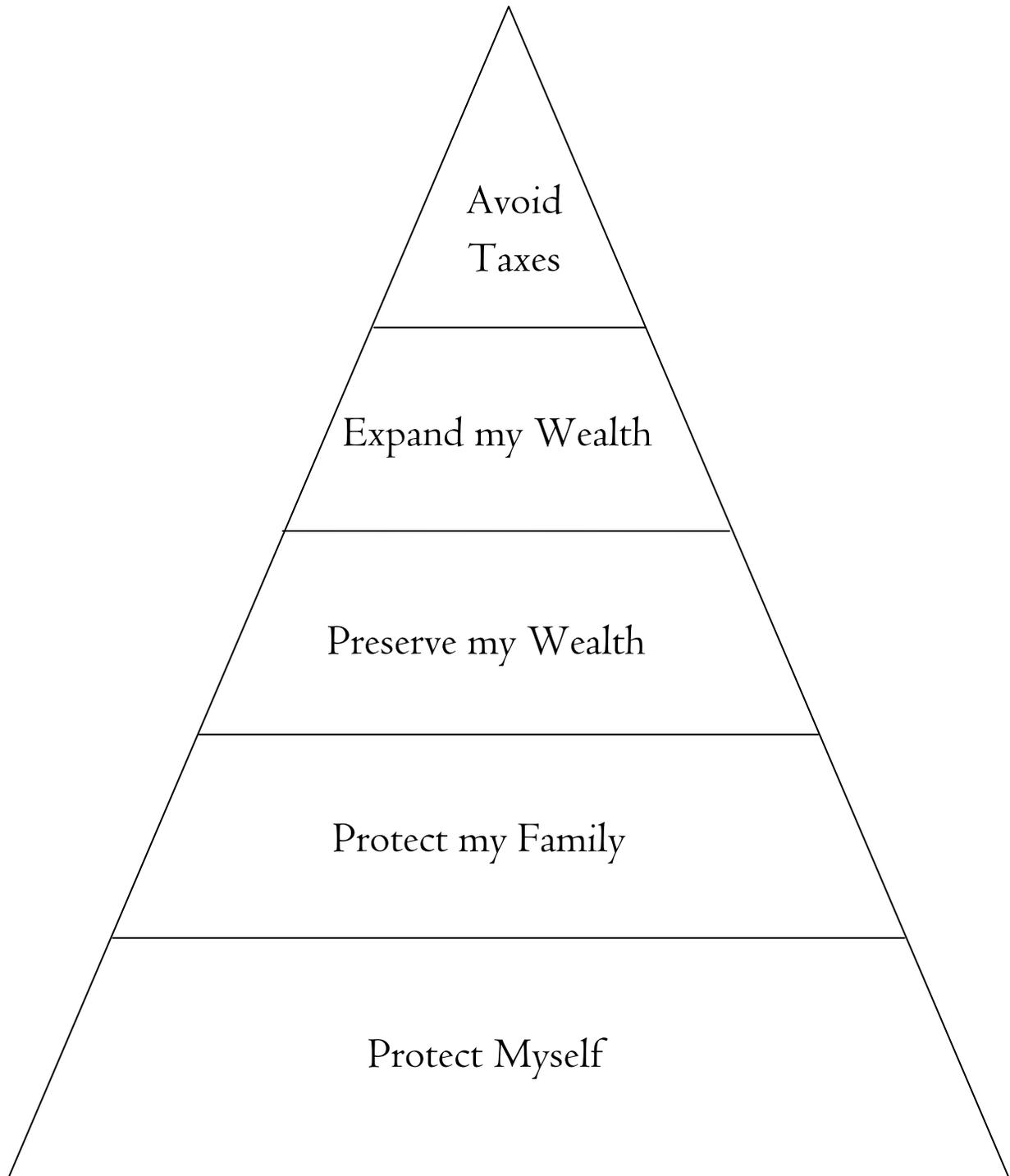
7. Quote the flat fee amount for completing your plan (**The Estate Price Sheet**)

8. Discuss what comes next and set an appointment for our next visit.

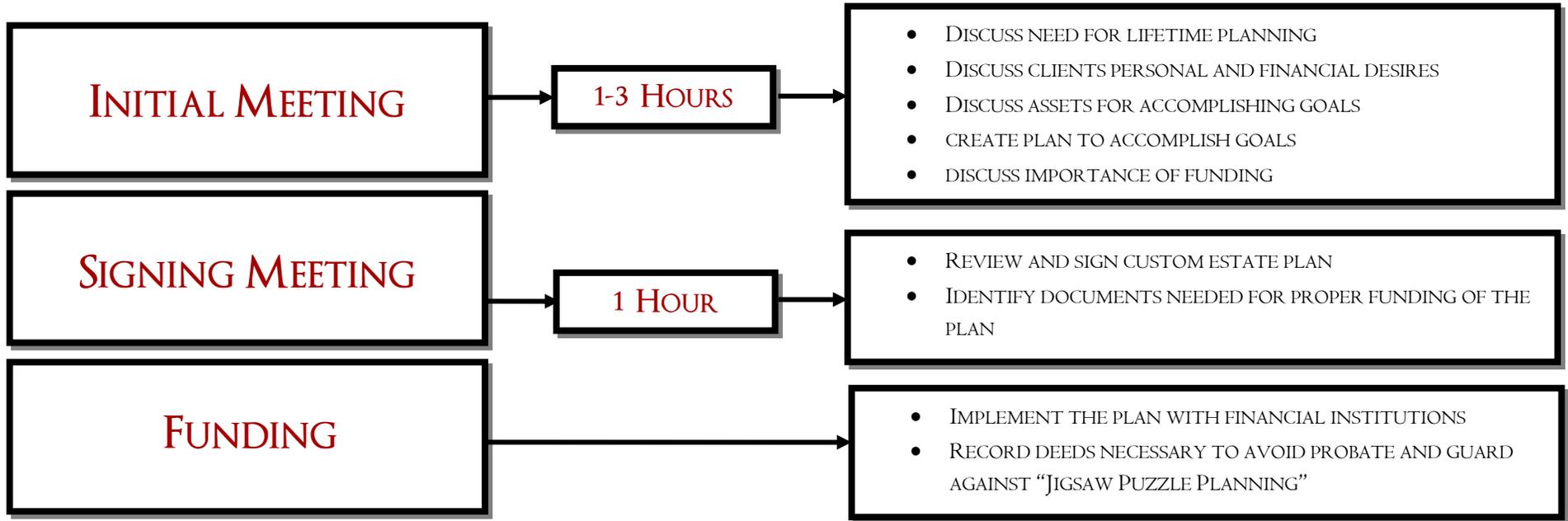
THE DEFINITION OF PROPER ESTATE PLANNING

I want to control my property while I am alive,
Care for myself and loved ones if I become disabled,
And give what I have to whom I want,
The way I want,
When I want.
Furthermore, if I can,
I want to save every last tax dollar,
Professional fee,
And court cost legally possible.

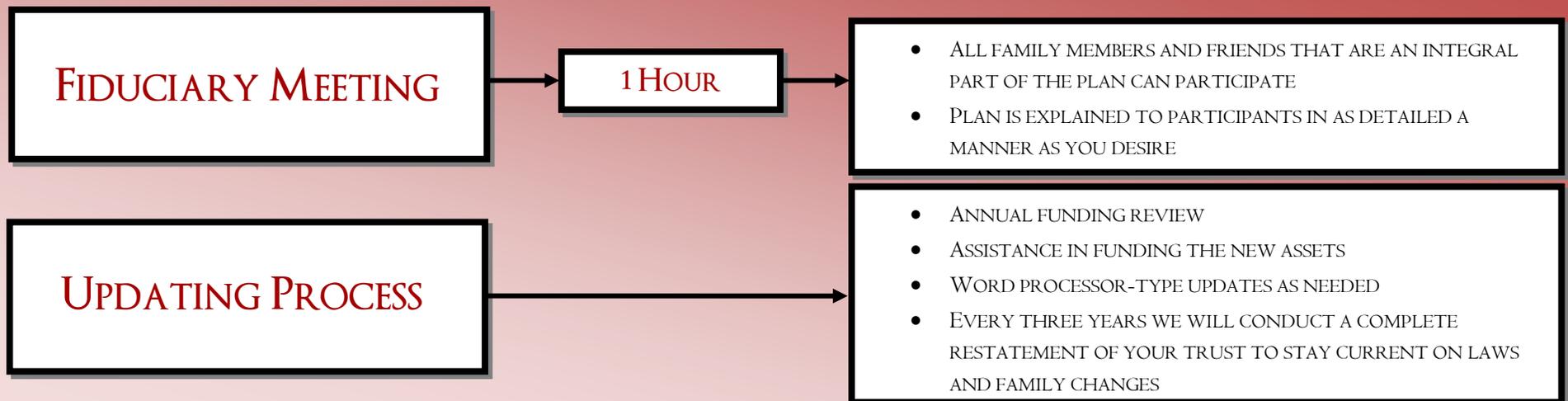
THE PLANNING PYRAMID



THE ESTATE PLANNING PROCESS



YOUR ANNUAL MAINTENANCE PROGRAM



WE SIGNED DOCUMENTS SAYING THAT WE WANT YOU TO
CREATE OUR ESTATE PLAN, NOW WHAT?

STEP 1

(Our Deadline) We will prepare a Diagram of your Plan along with a Name and Fiduciary Summary of who will be in charge of carrying out your wishes. This will be emailed no later than:

Summaries due date: _____.

STEP 2

(Your Deadline) Review the summaries and diagram emailed to you. Respond with any changes and/or corrections needed within your plan by:

Changes due date: _____.

STEP 3

(Our Deadline) We will make draft of your Trust documents based on the information we received in Step 1 and 2 **NOTE:** You will not be receiving a copy of these drafts; additional changes can be made on or after your signing date
No later than (*internal use only*):

Finalize due date : _____.

STEP 4

We will print, tab, and assemble your Estate Planning Binder.

NOTE: Once your trust is printed, if you reschedule your signing date you will incur a \$250 reprint fee.

Signing Date: _____.

We agree to the above timeline:

Date: _____

Greg Ashcraft: _____

Client: _____

Client: _____

If you have any questions about or during this process, give us a call at 951-304-3431.

THE ESTATE PLANNING PROCESS

YOUR ANNUAL MAINTENANCE PROGRAM

ATTORNEY FEE:

\$440/mo.

ONGOING COMMUNICATION WITH OUR FIRM

The members of our team are ready to answer any of your questions or concerns at any time. As a member, we will never bill you for the time spent answering questions on the phone.

INITIAL AND CONTINUOUS FUNDING

Our Firm assists you with the initial funding of your assets into your trust. We then continuously review your assets with you and provide an annual report of your assets to ensure that your plan is properly funded so your designated fiduciaries will always be able to maintain your property.

FIDUCIARY MEETING

This meeting allows you to meet with all of your friends and family who will be involved in the implementation of your process. You can invite your family as well as trusted financial advisors. Our firm will be there to facilitate an orderly discussion in which every member will learn what their role will be in the plan.

DISCOUNTS FOR FRIENDS AND FAMILY

We periodically send vouchers for their friends and family members to receive discounts on their own estate plans.

TRI-ANNUALLY UPDATED DOCUMENTS

Every three years, our firm will help you update your estate plan. This on-going process will ensure that your plan is up to date and will provide you with piece of mind that things will be taken care of when you're gone. Just as your life changes, the law changes as well. Our firm initiates changes to your estate plan when changes to the law are made.

ANNUAL REFRESHING OF POAS AND HCDS

Often financial institutions and health care organizations will not accept documents that are more than a year or two old. Even though these documents are still legally enforceable, getting these professionals to accept your papers is time consuming, frustrating, and could result in delay in you and your loved ones getting the permission needed to make quick decisions. For these reasons, we will refresh your Powers of Attorney and Health Care Directives annually.

COLLABORATE WITH YOUR FINANCIAL ADVISORS

Our firm collaborates with your financial advisors, accountants and insurance professionals in order to properly integrate your estate plan.

THE ESTATE PRICE SHEET

This is a list of our basic estate planning packages. Additional Charges may apply if your situation requires more specialized skill and planning. Situations include: a Non-US Citizen Spouse (add \$440), Blended Family Trust (add \$720), Special Needs Child (add \$1,445).

SILVER PACKAGE

- Counseling
- Wills
- Guardian Nomination for Minors
- Financial Power of Attorney
- Advanced Health Care Directive
- Certificate of Trust
- Revocable Living Trust:
 - Surviving Spouse Control
 - Incapacity Planning
 - Trustee Succession
 - Probate Avoidance
 - Simple and/or staggered distribution to heirs.
- Notarizing

\$3,285

GOLD PACKAGE

- Counseling
- Wills
- Guardian Nomination for Minors
- Financial Power of Attorney
- Advanced Health Care Directive
- Certificate of Trust
- Revocable Living Trust:
 - Surviving Spouse Control
 - Incapacity Planning
 - Trustee Succession
 - Probate Avoidance
 - Simple and/or staggered distribution to heirs.
- Notarizing
- Funding the Trust with your assets, including:
 - Real Property (\$440/deed)
 - Bank Accounts (\$140/bank)
 - Retirement Accounts (\$550/each)
 - Investment Accounts (\$275/each)
 - Insurance Policies (\$275/ each)
 - Transfer Business (\$720)

\$_____

PREMIER PACKAGE

- Counseling
- Wills
- Guardian Nomination for Minors
- Financial Power of Attorney
- Advanced Health Care Directive
- Certificate of Trust
- Revocable Living Trust:
 - Surviving Spouse Control
 - Incapacity Planning
 - Trustee Succession
 - Probate Avoidance
 - Simple and/or staggered distribution to heirs.
- Notarizing
- Funding the Trust with your assets, including:
 - Real Property
 - Bank Accounts
 - Retirement Accounts
 - Investment Accounts
 - Insurance Policies
- Beneficiary Protection Trusts
- Stand Alone Retirement Trusts
- Remarriage Protection Trusts

\$4,860 +Funding



A LA CARTE PRICE SHEET

- Revocable Trust \$1,445
- Special Needs Trust \$1,445
- Joint Pour-Over Trust (for blended families) add \$720 to revocable trust amount
- Non - US citizen spouse: add \$440 to revocable trust amount
- Pour-Over Will \$585
- Power of Attorney \$720
- Health Care Directive \$585
- HIPAA Waiver \$290
- Restatement Package \$2,890 (savings of \$625 when purchased together)
- Asset Protection Package: (Beneficiary Protection Trusts: \$585, Stand-Alone Retirement Trusts: \$585, Remarriage Protection Trusts \$585) add \$1,500 to revocable trust amount
- Amendment to Trust \$720
- Transfer of Business into Trust \$720
- Funding - Deeds for Real Property are \$440 each (California) \$625 each (Out of State)
- Affidavit Death of Spouse/Joint Tenant/Trustee \$440
- Rush Fee \$450 (if needed in less than 4 weeks)

