

# susanhuntlaw

*Our thoughtful estate planning packages provide varying levels of protection, suited to your unique needs and goals.*

<u>COMPLIMENTARY SERVICES!</u>	<u>THE WILL PLAN</u>	<u>THE TRUST PLAN</u>
<p><b>Guidance, Access, and Protection:</b></p> <ul style="list-style-type: none"> <li>➤ Phone Calls</li> <li>➤ Emails</li> <li>➤ 24/7/365 Access to Online Folder                             <ul style="list-style-type: none"> <li>◆ Name and Fiduciary Summary</li> <li>◆ Asset Summary</li> <li>◆ Health Care Form</li> <li>◆ Will/Trust Summary</li> <li>◆ Signed Documents</li> <li>◆ Kids Protection Plan®</li> </ul> </li> <li>➤ Fiduciary and Guardian Letters</li> <li>➤ In Case of Emergency Memorandum</li> <li>➤ Bi-Weekly Newsletter</li> <li>➤ Complimentary 3 Year Review</li> </ul> <p><b>Additional Services for Trust Plan:</b></p> <ul style="list-style-type: none"> <li>➤ Coordination with Other Advisors</li> <li>➤ Guidance from Us on Asset Transfers into Trust in the Future</li> </ul>	<p><b>For the Family Who:</b></p> <ul style="list-style-type: none"> <li>➤ Doesn't mind their loved ones going through probate</li> </ul> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>➤ Will</li> <li>➤ General Durable Power of Attorney</li> <li>➤ HIPAA Authorization</li> <li>➤ Health Care Power of Attorney</li> <li>➤ Living Will</li> <li>➤ Memorial Instructions</li> <li>➤ Personal Property Memorandum</li> <li>➤ Digital Assets Authorization</li> <li>➤ Letter to Executor</li> <li>➤ Estate Plan ID Card</li> </ul>	<p><b>For the Family Who:</b></p> <ul style="list-style-type: none"> <li>➤ Wants to make things easier on their family and avoid probate</li> </ul> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>➤ Revocable Living Trust</li> <li>➤ Pour-Over Will</li> <li>➤ Funding Instructions</li> <li>➤ General Durable Power of Attorney</li> <li>➤ Certificate of Trust</li> <li>➤ Assignment of Personal Property</li> <li>➤ HIPAA Authorization</li> <li>➤ Health Care Power of Attorney</li> <li>➤ Living Will</li> <li>➤ Memorial Instructions</li> <li>➤ Personal Property Memorandum</li> <li>➤ Digital Assets Authorization</li> <li>➤ Successor Trustee Handbook</li> <li>➤ Trust ID Card</li> <li>➤ Estate Plan ID Card</li> <li>➤ Funding Assistance with Deeds, Memorandums, and Forms</li> </ul>
<b>FREE!</b>	<b>FLAT FEE</b>	<b>FLAT FEE</b>
<u>KIDS PROTECTION PLAN®</u>	<u>THE YOUNG ADULT PLAN</u>	<u>THE AGING GRACEFULLY PLAN</u>
<p><b>Complimentary Plan for Parents with Minor Children</b></p> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>➤ Instructions to Sitters &amp; Caregivers</li> <li>➤ Caregiver Emergency Instructions</li> <li>➤ Temporary Medical Power of Attorney for Each Minor Child</li> <li>➤ Important Health Care Information for Minor Children</li> <li>➤ Nomination of Standby Guardianship</li> <li>➤ Minor Medical Power of Attorney for Each Minor Child</li> <li>➤ Instructions to Guardians</li> <li>➤ Family Emergency ID Card</li> </ul>	<p><b>Discounted Plan for Those Who:</b></p> <ul style="list-style-type: none"> <li>➤ Are between the ages of 18-24</li> <li>➤ Want to ensure health care wishes are turned into directives and someone is able to access and manage assets using a Durable Power of Attorney if they become incapacitated</li> </ul> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>➤ Will (optional)</li> <li>➤ General Durable Power of Attorney</li> <li>➤ HIPAA Authorization</li> <li>➤ Health Care Power of Attorney</li> <li>➤ Living Will</li> <li>➤ Digital Assets Authorization</li> <li>➤ FERPA Waiver</li> </ul> <p style="text-align: center;"><b>**Can be paired with Will or Trust Plan**</b></p>	<p><b>Option 1: Medicaid Planning - aka "Elder Law" for Those Who:</b></p> <ul style="list-style-type: none"> <li>➤ Want to maximize benefits, protect family wealth while still getting good care, and preserve assets for future needs of spouse and future generations</li> </ul> <p><b>Option 2: Empty Nester Plan - Discounted Will Plan for Those Who:</b></p> <ul style="list-style-type: none"> <li>➤ Do not have children or grandchildren.</li> <li>➤ Have limited assets and want to leave them outright to one or two specific people or charities.</li> <li>➤ Want to ensure health care wishes are turned into directives and someone is able to access and manage assets using a Durable Power of Attorney if they become incapacitated.</li> </ul>
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*Give your family what they deserve!*