

# Are you Questioning Whether or Not You Actually Need To Come In?

## Here is why you do!

### If You Are Thinking You Already Have an Estate Plan in Place

Estate planning documents by themselves are meaningless to your family if they are not kept up to date throughout your lifetime and if your assets are not owned in the right way to keep your family out of Court and out of conflict, when something happens to you. If there have been any changes in your life, the law or your assets since you put in place those documents and the documents have not been updated, come on in so we can make sure your plan still serves you and your family.

And if you have minor children at home, there is a very good chance that the documents were not prepared properly in the first place. That means your children could be at risk of being in the care of someone you would not want. Sadly, most lawyers simply do not have the knowledge, training or experience to plan properly for the care of minor children.

### If You Are Thinking You Do Not Have Enough Assets

In reality, you DO have Family Wealth, no matter how much or how little financial wealth you have. Family Wealth, which we will be discussing during our Planning Session goes far beyond your money. It covers everything you create in your life and pass on when you are gone. No matter what, your family will have to make hard decisions, pay your bills, get access to your home and vehicle and social media accounts, when something happens to you. This can be easy for them during a time of extreme grief, or it can be hard. What you do now is what determines how hard or how easy it will be.

And, if you have dependent children at home, planning is a must. You would never think of leaving your young kids or teens at home for an extended period with the one person you would never want, so why would you leave that to chance for a substantial part of their lives if something happens to you.

The Family Wealth Planning Session you have scheduled with us is designed to take an honest look at what you really do need in place to provide for the well-being, and care and ease of the people you love the most. If it turns out you don't need any planning at all beyond the Session, you leave the Session educated, informed and feeling great that you have done the right thing by your family by investigating what's necessary to make things as easy as possible for them at the end of your life. Plus, most people who meet with us say that they've never felt more organized or at ease about their financial life than after experiencing our Family Wealth Planning process.

### If You Are Thinking You Can't Afford to Plan

You don't have to worry about that yet because when we meet we are first going to look at whether you need to plan. If it turns out you do need to plan, we will work together to make it affordable for you and your family. If you do not need to plan, you leave the meeting feeling great about having done everything you can to make sure things will be as easy as possible for your loved ones when you're incapacitated or have left us.

**Rest easy, I am here to make this whole process of thinking about difficult subjects easier for you and your family. I look forward to meeting with you for your Family Wealth Planning Session. Please remember to complete your Family Wealth Inventory and Assessment and return it to us before your Family Wealth Planning Session so we can make the very most of our time together.**