

WHY YOU MIGHT NOT WANT TO KEEP YOUR APPOINTMENT

You Think You Already Have an Estate Plan in Place

If you already have a Will, Trust, Health Care Directives and/or a Power of Attorney in place, you may think you don't need to come in and meet with me about your family's legal planning.

Here's why you would want to come in anyway.

The reality is that estate planning documents won't work to protect your family if they are not kept up to date throughout your lifetime and if your assets are not owned in the right way.

If there have been any changes in your life, your assets, or the law and you have not updated your plan, an attorney review is critical to make sure it still matches your family's needs.

And, if you created a plan somewhere else besides with us, you probably did not incorporate mechanisms to **protect your own assets during your lifetime**, as well as **your children's inheritances**. We regularly incorporate asset protection into our trusts using cutting edge drafting techniques that few other attorneys are even familiar with, let alone have the skill and expertise to utilize. We use the trademarked Living Trust Plus and the Personal Asset Trust to protect our client-family.

You might be wondering about these, but not to worry though ... we'll discuss everything and answer any question when you come in.

You Think You Do Not Have Enough Assets

You may be thinking you do not need an estate plan because you don't have an estate.

And you might be right. If you do not own a home and significant assets, you still have an estate worth protecting. There are a couple of things you still will need to have in place, if you value yourself and your loved ones, a conversation with a specialized attorney about this is still a conversation worth having.

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You will still need a plan in place to ensure that health care and financial decisions can be made for you in the way you want in the event of an accident. Otherwise a judge will choose someone for you, and might not choose who you want!

You will additionally want some sort of plan for distribution so that the government does not force your family to use theirs, should you pass.

Our Discovery Meeting is designed to take an honest look at what you really do and what you really don't need. If it turns out that you're already set, you'll leave better educated, informed, and feeling great that you have done the right thing by meeting and making an expert determination.

If it turns out you do need planning, we will work together to craft what's in your best interest based on your needs, budget, and the stage of life that you're in. And most importantly, we will make sure that whatever we create remains up to date and works at the moment its needed, not just when its drafted.

You Think You Can't Afford to Plan

The last reason you may not want to keep our appointment is that you may think you cannot afford it.

That may or may not be true.

But you don't have to worry about that yet because we are first going to look at whether you need to plan before charging you a single penny. If you don't need to plan, you'll leave our meeting feeling great about having done everything to make sure things will be as easy as possible for your loved ones if and when something happens to you.

If it turns out you do need to plan, we will work together to make it affordable for you and your family. I can guarantee you that planning is substantially less costly than it would be for your family if you become incapacitated or die with a plan that doesn't work or with no plan at all. And I've never had a single family who believed in this kind of planning and wanted to put it in place for their loved ones, yet left my office because they couldn't afford it.

We've made creative financing available to our clients because we know that this planning is the foundation for a lifetime of success!

So, rest easy, don't worry about a thing. Our firm's mission is to give you peace of mind.