

Estate Planning Success – Road Map



Deep-Dive/Discovery

- Gather data
- Goals, milestones, timeline
- Comfort level with risks
- Additional concerns long term



Strategic Analysis & Design

- Review asset allocation
- Impact of expense and taxes
- Plan feasibility and design
- Short and long view
- Agreement to proceed with plan



Implementation

- Execute legal documents
- Re-title assets
- Coordinating with other Advisors
- Train successors



Progress Monitoring

- Ongoing reviews
- Plan updates
- Allocation adjustments
- Future planning