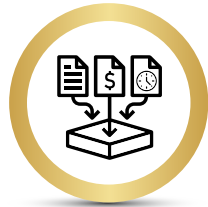


Estate Planning Success – Road Map



Deep-Dive/Discovery

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



Strategic Analysis & Design

- Review current situation
- Address impact of laws and taxes
- Plan feasibility and design
- Confirm all considerations are included
- Agreement to proceed with plan



Implementation

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



Progress Monitoring

- Ongoing reviews
- Plan updates
- Tax and Legal changes
- Future planning