

# 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
- Coordinate with other Advisors
- Train successors



## Progress Monitoring

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