*What does RLT offer?*

***Estate Planning;***

You already have a Revocable Living Trust? RLT will come and do an “Administrative Review”. RLT will discuss any issues you might have and questions you need answered and then discuss them with the Estate Attorney. With the Administrative Review, RLT will also look to make sure documents have been witnessed, notarized and signed. This is a very important process. There are always new laws and changes that happen. Make sure your trust is up-to-date.

A trust written by a leading “Estate Attorney”. This includes Successor Trustees, Beneficiaries, P.O.A.’s set up for both medical and financial. A Pour over will, a Living Will, a Quit Claim Deed, a Trust Agreement and much more. The Trust is witnessed and notarized.

Death Settlements; we will come visit you and/ or your family to follow the steps laid out by the attorneys to help with this time of loss. When you have a Trust, you need the help and support to make sure all involved are moving forward in the right direction. RLT is experienced in these steps and can help during this time need.

***Retirement Planning;***

Annuities fixed/ indexed

Income for life, Guaranteed

401k roll-over

IRA roll-over

Pensions

Life insurance

Term Life insurance

Burial insurance

Long-term care insurance / nursing home

Mortgage insurance

Tax-free dollars for college (for kids and grandkids)

Retirement plans for small businesses (both principals and employees)

A total evaluation of your current financial situation