

COMPREHENSIVE LIVING TRUST ESTATE PLAN

For RESDC Members

Retail Value \$2,800

Courtesy Discount \$1,950

\$850

Benefits of a Living Trust Estate Plan

- ❖ Avoids probate at death, including multiple probates if you own property in other states
- ❖ Prevents court control of assets at incapacity
- ❖ Provides maximum privacy
- ❖ Allows for quicker distribution of assets to beneficiaries on death
- ❖ Can be revoked or changed at any time
- ❖ Can reduce or eliminate estate taxes
- ❖ Can protect minors with special needs

Documents Included in the Living Trust Estate Plan

- ❖ Revocable Living Trust (if married, Joint with Disclaimer or A/B provisions, if appropriate)
- ❖ Trustee's Certification of Living Trust
- ❖ Community Property Agreement (if both spouses choose to have one)
- ❖ Pour-over Wills
- ❖ Durable Powers of Attorney for Asset Management, Funding and Special/Limited Powers
- ❖ Advance Medical Directive (Power of Attorney for Health Care) with HIPAA Release forms
- ❖ General Asset Transfer Documents and Letters
- ❖ Specific transfer documents (i.e., Quitclaim or Trust Transfer Deed for Primary Residence*)
- ❖ Explanatory materials regarding selected estate-planning concepts
- ❖ Location Lists
- ❖ Final Instructions Checklist and Burial Instructions Forms

Lopez & Wilmert
Law Office of Scott Soady

(619) 589-1112 larisa@lopezwilmert.com
(858) 618-5510 scott@help411.com

La Mesa & Chula Vista
Rancho Bernardo

*Includes preparation of Assignments for the transfer of all personal property assets, using descriptions furnished by the client. A separate fee will be charged for all real estate transfers. Clients are responsible for transfers of real property outside of California. A separate fee will be charged for Generations Skipping Trusts and Special Needs Trust. Client will be responsible for paying any filing or recording fees. Review of existing Trust \$300, will be applied to reinstatements or amendments.