



Your Workbook

Estate & Legacy Planning

HOW TO KEEP YOUR FAMILY
OUT OF COURT AND CONFLICT

3 WAYS TO GET MASSIVE VALUE

FROM THIS WORKBOOK

01

Print this workbook and **refer to it** during our educational webinar to stay fully engaged and **take notes** on the actions you want to implement quickly.

02

Think of **ONE question** you want answered and write it below while we are on the webinar together. If I don't answer your question during the webinar, I will give you several ways to make sure you do!

03

Who or what needs your protection?

THE REALITY IS...

01

Estate planning is not about _____.
It is about the people you love most.
They will know whether you lived up to your
promise “_____.”

02

“Before perspective”
What is the state of your estate plan right now?

- I do not have an estate plan.
- I just have a document here or there.
- I have a generic estate plan that does not address my family’s unique situation.

03

The “After” perspective is when I have a
tailored plan that’s _____
in writing, clear and _____.

ANGEL ADVOCATES

ESTATE PLANNING. GUIDED BY LOVE. GOVERNED BY LAW.

01

My loved one is the angel

I care deeply about keeping my loved ones out of court and conflict and can do this through _____ estate planning.

02

I am the angel

Klea believes that a thoughtful plan will have a far reaching impact on my beneficiaries' decisions. I can be their guardian angel.

We also record _____ conversations yearly or every three years so I will have a library of experiences and _____ to speak to my descendants long after I am gone.

03

They're the angel

Easily accessible webinars

_____ communication

Checkups on my planning

Emphasis on _____ family relationships

ACTION ITEMS

- I want to learn more about priceless conversations.
- I want to check out some other webinars.
- I want to discuss alternatives to disinheriting a child that still address my concerns.

LIFE INSURANCE FOR A MINOR

SAD DAY NO. 01

01

_____ is required.

02

_____, _____, _____
and _____ designations
override your will.

03

A _____ is a will substitute.
When I _____ my trust properly, my family
has the best chance at not going to probate.

ACTION ITEMS

- How are my assets titled? What would happen?
- I might need to avoid probate. Check on my adult kids/parents.
- I want to ensure my kids/grandkids do not become teenage millionaires.
- I want to ensure my kids/grandkids have special guidance when they inherit.
- I have a special needs child/grandchild.
- I want to ensure my surviving spouse and children's inheritance is protected from lawsuits, creditors, and future divorce or second marriages.

HOW YOU TAKE ACTION TODAY

BEFORE IT'S TOO LATE

Claiming my Golden Ticket allows me to schedule my complimentary Family Wealth Planning Session _____ (\$750 value). The one catch is I need to complete my _____. I claim my second gift if I schedule within 24 hours (\$250-500 value).

This is a **working meeting** where you choose which **estate plan is _____ for you**, we start **designing** your estate plan, you sign the engagement agreement, and you select a **payment option**.

Then we will schedule your Signing Ceremony before you leave, which is the big day of _____ that **your estate plan is in place!**

ACTION ITEMS

- Claim my Golden Ticket so I can schedule a complimentary review of my situation in the future.
- Schedule my Family Wealth Planning session online at AngelAdvocatesLegal.com today and get \$250 off my planning.
- Schedule my Estate Plan Review today at AngelAdvocatesLegal.com and get \$500 off my planning.
- I have questions about a personne de confiance.

EMERGENCY SITUATION

SAD DAY NO. 02

01

Only _____
_____ are the default
temporary guardians.

02

_____ guardianship is just
as important as who raises your kids.

03

Your plan _____
unless you share it with others.

ACTION ITEMS

- I need a kids / elder / special needs / pet protection plan.
- I need to document their medical and life routines as well as long term guardian instructions.
- I need to legally memorialize a private document of who I absolutely DO NOT want to be considered as guardian, long term or short term.

ADULT IS INCAPACITATED

SAD DAY NO. 03

01

Your doctors cannot talk to anyone about your condition without _____.

Your medical decisions are made by your _____ by default.

02

A power of attorney has a fiduciary duty to keep accurate _____ and _____ to document their use of your accounts for your benefit.

03

The only person other than you who can make your decisions is a _____.

ACTION ITEMS

- I need to update or review my health care agent / HIPPA.
- I need to have a discussion with my entire family so they are clear about my wishes and don't argue with my agent.
- I need to review my power of attorney and put in protections that discourage exploitation.
- I need to put my health care directive on file with my medical provider and my power of attorney on file with my financial institution.

ANGEL ADVOCATES

ESTATE PLANNING. GUIDED BY LOVE. GOVERNED BY LAW.

DRAW A LINE TO MATCH

45 minute total time spent designing

Personalized to your family

Place on a shelf and never look at it again

Review all documents before signing

Ignores the intangible legacy

Priceless conversations/letters

No problem disinheriting family members

Traditional
Experience

Angel
Advocates

ACTION ITEMS

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CHEAT SHEET

FILL IN THE BLANKS

THE REALITY IS...

you
"I took care of it"
personalized
comprehensive

ANGEL ADVOCATES ESTATE PLANNING

thoughtful
priceless
advice
responsive
healing

SAD DAY NO. 1

probate
title, joint ownership
beneficiary designations
trust
fund

HOW YOU TAKE ACTION

later
homework
right
celebration

SAD DAY NO. 2

adult blood relatives
short-term
will not work

SAD DAY NO. 3

HIPAA
spouse
records
receipts
probate judge

ANGEL ADVOCATES DRAW A LINE TO MATCH

Traditional Experience

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Angel Advocates

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- Priceless conversations/letters
- Review all documents before signing

CONTACT US

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ATTORNEY & COUNSELOR AT LAW

For our blog, online legal tools,
downloadable materials and
online scheduling:
AngelAdvocatesLegal.com



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