

Estate & Legacy Planning

HOW TO KEEP YOUR FAMILY OUT OF COURT AND CONFLICT

3 WAYS TO GET MASSIVE VALUE

FROM THIS WORKBOOK



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.

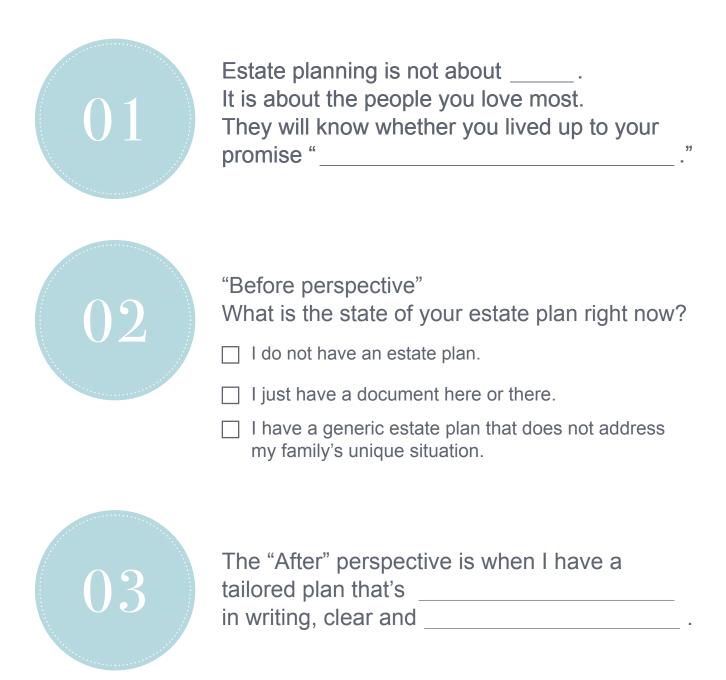


Think of **ONE question** you want answered and write it below while we are on the webinar together. If I don't answer your question during the webinar, I will give you several ways to make sure you do!



Who or what needs your protection?

THE REALITY IS...



ANGEL ADVOCATES

ESTATE PLANNING, GUIDED BY LOVE, GOVERNED BY LAW.

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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.



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.



They're the angel

Easily accessible webinars

_ communication

Checkups on my planning Emphasis on

family relationships

☐ 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	andoverride your will.	designations
03	A is a will substitute. When I my trust properly, my family has the best chance at not going to probate.	

☐ 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 divore or second marriages.	

HOW YOU TAKE ACTION TODAY

BEFORE IT'S TOO LATE

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.	r
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 an get \$500 off my planning.	d
☐ I have questions about a personne de confiance.	

EMERGENGY SITUATION

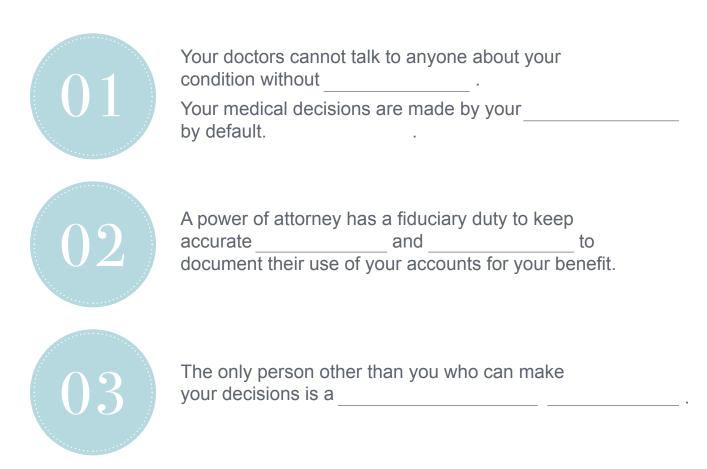
SAD DAY NO. 02

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.

☐ 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



☐ 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 Traditional Personalized to your family Experience Place on a shelf and never look at it again Review all documents before signing Angel Advocates Ignores the intangible legacy Priceless conversations/letters No problem disinheriting family members **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.

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

- 45 minute total time spent designing
- Place on a shelf and never look at it
- Ignores the intangible legacy
- No problem disinheriting family members

Angel Advocates

- Personalized to your family
- 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:
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