

Forward-thinking estate planning in Durham, N.C.

We guide clients to give them peace of mind about their future. Call today for a free phone consultation.

| The Basic Planner | The Careful Planner | The Ultimate Planner |
|---|---|--|
| For the self-reliant planner who is comfortable interacting with a North Carolina-licensed lawyer through web forms, online portals, and email. We provide electronic documents tailored to you, and you arrange to print and sign them on your own schedule. | For those who want a higher level of guidance and personal touch. Through in-office consultation, you will receive information on the full landscape of estate planning options and advice on your personal and family situation. | For the client wanting to spare loved ones the hassle and expense of probate after death. Jeff works with you to develop a trust-planning solution that can protect your bequest from creditors, leave assets to a disabled family member, and protect you late in life. |
| Single or couple \$950 | Single \$1,750 • Couple \$2,250 | Single \$3,750 • Couple \$4,750 |

| Products | The Basic Planner | The Careful Planner | The Ultimate Planner |
|---|-------------------|---------------------|----------------------|
| Will | ✓ | ✓ | ✓ |
| Power of Attorney | ✓ | ✓ | ✓ |
| Health Care Power of Attorney | ✓ | ✓ | ✓ |
| Medical Records Release | ✓ | ✓ | ✓ |
| Living Will | ✓ | ✓ | ✓ |
| Revocable Living Trust | | | ✓ |
| Services | | | |
| File in appropriate government offices | | ✓ | ✓ |
| Guidance in reviewing your beneficiary designations | | ✓ | ✓ |
| Phone consults with your CPA and financial advisor | | ✓ | ✓ |
| Free amendments within one year | | | ✓ |
| Annual family consults for five years | | | ✓ |
| Transfer up to three NC property deeds to a trust | | | ✓ |
| Transfer up to three vehicles to a trust | | | ✓ |