

FRIENDS & FAMILY PLAN

- designed for those individuals who do not have assets that are required to be probated and are not high net income individuals
- ensure that loved ones left behind are properly cared for, and that your children and/or finances are taken care of in the event of death or incapacitation
- if you have certain health care desires that you require
- includes: will, durable power of attorney for finances and healthcare directives. It also includes a Minor Protection Package (not drafted separately) where applicable

TRUSTED PLAN

- designed for those individuals who wish to handle the distribution of their assets in private, without the need for court intervention
- includes all components of the Friends & Family Plan
- additionally includes a Trust
- also comes with added assurance and peace of mind that your assets will be transferred to your loved ones with the most ease and convenience possible

FUNDERBURG LAW

Estate Plan Packages



TRUSTED PLAN PLUS

- designed for those individuals who also require the comfort of knowing that all of their desires play out exactly the way in which they intend for them to
- we handle the transfers and associated documentation with any transfers for you
- appropriate for families who do not have the time to finalize their Estate Plan or who may not be savvy enough to finalize it on their own
- includes all of the components of the Trusted Plan, plus an in-depth analysis on how your assets are titled in order to effectively transfer them to your probate avoidance devices

FAMILY PLANNING CONSULT

- strategic family planning session where you come armed with questions and answers to the Family Planning Questionnaire
- discuss the details surrounding your familial situation
- unravel every minute detail about your life, your assets and liabilities, your children, pets, friends, family and loved ones and determine who gets what, when.
- sets the basis for your estate planning needs