TUPPER BUTLER LAW

WE KNOW THE POWER OF PLANNING

ESTATE & ASSET PROTECTION PLANNING PROCESS

**Following the Power to Plan Legal Consultation
and Execution of Engagement Agreement**

STEP ONE: Design

We first **DESIGN** your plan with you based on your unique goals and concerns regarding finances, health, property, and any minor children or other dependents. We provide written prompts to help you think through your personal wishes and discuss any specific concerns you have with family or finances.

STEP TWO: Drafting

Next, we **DRAFT** the legal documents to preserve and protect your plan – usually a document to manage your property (a Last Will and Testament, Revocable Living Trust, or Asset Protection Trust), a financial power of attorney, a healthcare power of attorney, and all relevant materials and guidance.

STEP THREE: Plan Review and Funding Discussion

We then host an interim **PLAN REVIEW** to explain your documents with plain-language summaries, answer any questions, and confirm your decisions. For trust-based plans, we also prepare a Funding Table to review assets for transfer to the trust and discuss the trust funding process with you.

STEP FOUR: Sign and Celebrate

Once you sign off on any revisions to draft documents, we **SIGN AND CELEBRATE** the execution of your plan! Though your plan documents will be familiar to you, we highlight key features and answer any remaining questions during signing. We scan the documents for you to take home that day in a sleek portfolio OR schedule a time for you to pick up a carefully assembled binder containing your executed documents.

STEP FIVE: File Closure and Trust Funding

To complete our engagement, we provide you with electronic files of each document in your plan and give you access to a secure portal for you to download anytime. For trust plans, we have at least one follow-up call to guide proper transfer of assets to your trust. If you wish, we can arrange an extra family meeting to explain your plan and who may play what role in the future.

We know circumstances change as life unfolds and will always answer questions about your plan, even after we close your file. We recommend you closely review your plan every two to three years to confirm the currency of your choices. We invite you to contact us for any legal updates to your plan when the need arises.

Enjoy the peace of mind that comes with the Power of Planning!