

The Three Step Strategy™: Estate Plans that Really Work!

Our firm's attorneys use a Three Step Strategy™, partnering with clients and their financial advisors to develop personally counselled estate plans that go far beyond form documents. The attorney, client, and financial advisor then commit to maintain the plan through a formal updating and education process. Finally, when the time comes, the client's family secures appropriate assistance from the attorney, financial advisors, and others to ensure that the client's wisdom is transferred along with the client's wealth.

**NATIONAL NETWORK
of Estate Planning Attorneys**
Better Practices for Better Lives.™

STEP 1 PREPARATION Develop your plan with counselling-oriented planning partners

Client Education
Our attorneys initially educate you about proper estate planning with critical background information prior to delving into the specifics of your particular situation. Education may include workshops, story telling, one-on-one consultations, books, and tools.

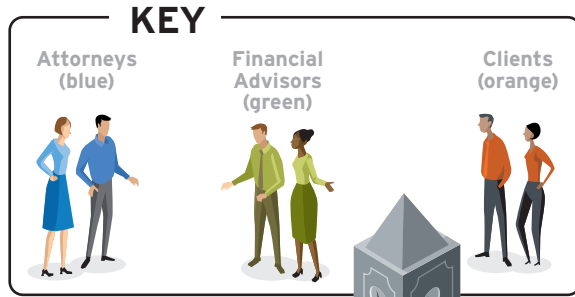
Data Gathering
We work with you to gather and organize information about the people you love and the property you own. Together we begin to develop your personal planning goals and the roles your helpers will fill to implement those goals.

Client Relationship Decision
You and our attorney determine whether to make mutual commitments and begin the formal estate planning process. Clear expectations are critical as we are about to begin a long-term relationship, and planning that could transcend generations.

Plan Design
You and your attorney assess and clarify your needs through in-depth legal counselling, and together you design an estate plan that will serve you and future generations as the foundation and guardian of your wealth and wisdom.

Document Creation
Your attorney drafts documents in "plain English" that integrate your instructions with cutting edge legal counsel and advice. These documents serve as the written repository of your wisdom about your loved ones and the property you own.

Delivery
You review your documents with your attorney and then sign them. Thus begins a lifetime planning process, as you have succeeded in creating living documents that contain your instructions for your loved ones!



We've created a platform from which our law firm provides you and your family counsel and advice in coordination with your financial and accounting professionals. This ensures your estate plan actually works the way you intended!

STEP 2 MAINTENANCE Commit yourself and your family to a continuing maintenance and education program

Funding
You, our team, and your financial advisor work together to retitle your assets into the estate plan, to ensure that they are handled according to your written instructions. Since you will continue to buy and sell property and assets, this "funding" process must continue throughout your lifetime.

Wealth Reception
Too much focus on wealth transfer can overshadow the real planning needs that emerge as beneficiaries receive your wealth. Proactive planning anticipates these needs, and provides guidance and assistance to meet them, as well as any needs that aren't anticipated. Strategies, such as Protective Trusts, leave customized instructions, individualized advice, and a process that makes the wisdom you accumulated over your lifetime available to your survivors as they receive your wealth.

Settlement
After your death, your attorney and financial advisors work with your survivors to appropriately assist in the transfer of your assets— as determined by your survivors and spelled out in your plan.

STEP 3 LEGACY
Secure appropriate assistance to ensure that your wisdom is transferred along with your wealth

Updating
You, your attorney, and your advisors reevaluate your plan on a predetermined schedule to incorporate necessary changes. The funding of your assets into your plan must also be updated to reflect new or sold property and assets.

On-going Client Education
Our firm and colleagues across the country in the National Network of Estate Planning Attorneys continually educate you, your family, and designated helpers about your estate plan. You will better remember the choices of your plan, and will maintain control by discussing changes in your assets, in the law, or in your life goals and values.