



wills & wellness®  
estate planning  
Foundation. Family. Future.

## Legal Documents

### Included in ALL Plans

- Long-Term Guardianship
- Short-Term Guardianship
- Financial Power of Attorney
- Medical Power of Attorney
- Living Will
- HIPAA Release
- Revocable Living Trust (with Pour-Over Will)  
*Dynasty & Classic Plans Only*
- Last Will & Testament
- Documents for Personal Property

# Dynasty Plan

## Classic Plan Plus...

### Protect Your Assets:

- Attorney-Funding of All Assets
- Four Additional Real Estate Deeds

### Additional Benefits:

- Complimentary Meetings with Loved Ones (During Lifetime & Upon Passing)
- USB with PDFs of Estate Plan Documents

### Lifetime Benefits:

- Complimentary Lifetime Client Membership
- One Additional Trust
- One Business Formation

**PRICING: \$15,000**

# Classic Plan

## Legal Documents Plus...

### Protect Your Kids:

- Emergency Wallet Card Listing Short-Term Guardians
- Short-Term Guardian Call-List for Caregivers & Schools

### Protect Yourself:

- Emergency Wallet Card Listing Medical Decision-Makers

### Protect Your Assets:

- Attorney-Funding of Real Estate (1 Deed), Vehicles, Businesses, Promissory Notes
- Instructions for Client-Funding of Financial Assets
- Personalized Asset Spreadsheet

### Protect Your Legacy:

- Legacy Meeting
- Access to Legacy Suite, Legal Guides & Legacy Video

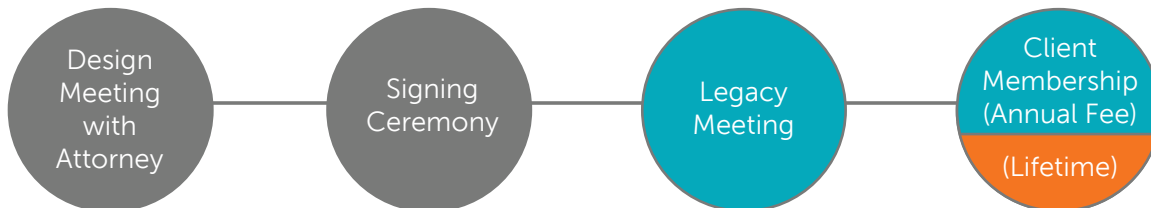
### Additional Benefits:

- Access to Client Membership Program for Ongoing Support (*Annual Fee*)
- Estate Plan Guide with Contact Information
- PDFs of Estate Plan Documents Uploaded to Secure Client Vault
- Customized Diagram of Trust

### PRICING OPTIONS:

|                     |         |
|---------------------|---------|
| Single No Minors:   | \$3,750 |
| Single With Minors: | \$4,250 |
| Couple No Minors:   | \$5,250 |
| Couple With Minors: | \$5,750 |

## Client Service Process



## Basic Plan

Legal Documents (*Includes Will ONLY*)

### PRICING OPTIONS:

|                     |         |                     |         |
|---------------------|---------|---------------------|---------|
| Single No Minors:   | \$1,250 | Couple No Minors:   | \$2,250 |
| Single With Minors: | \$1,750 | Couple With Minors: | \$2,750 |