



FAMILY LEGACY
ESTATE PLANNING LAW



Your Life & Legacy Planning Session

*What to Expect in Your Legal & Tax Planning
Session with Attorney Emily Brenner*

FAMILY LEGACY ESTATE PLANNING LAW, LLC

www.familylegacyestateplanninglaw.com



Greetings!

I'm Emily Brenner, and I'm here to help you put a plan in place that protects your family and allows you to not just Rest In Peace, but avoid being Robbed in Probate, and also Relieved in Prosperity.

I get it - estate planning doesn't seem fun to think about! But, we consistently hear we make it as easy as possible, and it feels so good afterwards. Plus, if you don't think about it now, the state has a plan for you, and you probably won't like it.

My role is to make sure that your family isn't left with a mess, but with a plan you choose.. And to use the planning process itself to create more connection for you with the people you love. Because ultimately, Life & Legacy Planning is something you do for the people you love.

Here's what you can expect at your Life & Legacy Planning Session.

After our meeting, you'll have complete peace of mind and a clear plan tailored to your family and assets, all within your desired budget.

Before We Meet...

- Be sure to fill out your Life & Legacy Inventory & Assessment. It's time to make a game plan. Do the best you can - it doesn't have to be perfect! Fill out as much as you feel comfortable sharing. The more you share, the more I can support you, and the less likely it is that your assets will be lost when something happens to you (there's currently \$71B of lost assets being held across the US).
- If you are married or have a partner, make sure you are both able to attend. If this is not possible, please call my office to reschedule or use the calendar link to find a time that works for both of you!
- Set aside 2 hours for your session. This is your chance to get your questions answered by a licensed attorney with the heart of a counselor and the soul of an educator so you can fully understand and decide what type of plan will bring you and your family the most peace of mind, based on your unique family dynamics and assets. You want to use this time wisely!

Do You Have Questions?

My email is always open as I am your newest resource:

emily@FLEPL.com

I look forward to seeing you at your
Life & Legacy Planning Session!



Life & Legacy Plans

Our thoughtful estate planning packages provide various levels of protection, suited to your unique needs and goals.

LEVEL ONE

FAMILY PLAN



For The Family Who...

Doesn't need to avoid probate, but wants to protect minor kids or their own well-being in the event of incapacity.

Your Family Plan...

Includes a Will, Health Care Directives & Powers of Attorney so you know that you are well taken care of if anything happens as well as a Kids Protection Plan to ensure your children are always raised by the people you want, in the way you want and never taken out of your home by the authorities.

May include post-death trust planning to protect assets for the people you love.

LEVEL TWO

TRUST PLAN



For The Family Who...

Wants the peace of mind of keeping their family out of court, not just out of conflict.

Your Trust Plan...

Provides peace of mind knowing we are here to guide you during life & care for your family later. The Trust Plan keeps your loved one's out of Court, all of your affairs totally private & ensures your family can turn to us when necessary. All asset transfers will be handled by you, with unlimited guidance and support from us. A Kids Protection Plan will be included if you have minor children.

LEVEL THREE

WEALTH PLAN



For The Family Who...

Wants us to handle everything for you with the greatest amount of convenience.

WE DO IT ALL FOR YOU!

Your Wealth Plan...

Includes all components of the Trust Plan PLUS we analyze how each of your assets is titled and handle all asset transfers for you to guarantee your plan works for your family. We prepare a Life & Legacy Inventory, complete all bank, brokerage, insurance and retirement account documents to transfer title and change beneficiaries.

Life & Legacy Planning Process

Schedule Date

Life & Legacy Planning Session

(In-Person will be 2 hours, Virtual will be 2 one hour sessions)

Get Acquainted
Identify Areas of Concern
My Recommendations to You
Design Your Life & Legacy Plan

Document Review

(Virtual or in-Person)

Review Your Asset Inventory + Your Choices and Plan Documents
Answer Your Questions
Finalize Plan Selections

Signing Ceremony

(Virtual or in-Person)

Sign Your Plan Documents
Review Your Funding Toolkit (disregard if having trust professionally funded)

Legacy Session

(Virtual or in-Person)

Deliver Binder with Originals & Flash Drive
Review Letters to Your Plan Fiduciaries
Focus on the Future - Your Legacy



1 Year or 3 Year Follow-up

Check on Status of Your Assets
Look at What's Changed
Keep Your Plan Up to Date



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