



The 7 questions to ask yourself when planning your estate

Got questions about estate planning? Most do. Here's the 7 we hear often. We created this to **demystify estate planning**. It's easier, faster & less costly than most people think.



Take care of loved ones



Peace of mind



Estate planning for all

1

Why do estate planning?

So you decide (not the government) what should happen if you die or become incapacitated.

- ✓ **Put your wishes** in writing to declare to the world
- ✓ **Be in charge** of your finances, health & kids
- ✓ **Decide who** gets what
- ✓ **Avoid costly** probate court
- ✓ **Transfer assets** of your loved ones—quickly

Otherwise... **No estate plan = the government plan**

Often: Probate costs ~\$25K in attorney's fees & can eat up 2+ years. While a Trust can cost around \$4K. **But with us, be done in less than a year.**

2

What makes up an estate plan?

In our world, we've made estate planning **easy, quick & affordable**. With these simple packages...

Estate Plans

Take care of your loved ones in a few steps—less than 3 hours. With minimal costs & maximum control for what happens after you die.

Advice Calls

Speak with a lawyer without breaking the bank. Whether for a prenup, home title, aging parent or anything else on your mind.

DIY Forms

Only need a Power of Attorney or Health Care Directive? Do a short form and get your document within 48 hours.

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What's it cost?

See prices below for packages above.

- ✓ **Estate plan:** \$1500—which works for 95% of customers
- ✓ **Personal advice:** \$250 & \$500 per 30 or 60 min sessions
- ✓ **DIY forms:** Minimum fees & time to complete for basic docs
- ✓ **Legal insurance:** Most pay only \$175 for estate plans

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STEP

1

5-10 mins

STEP

2

30-60 mins

STEP

3

15-30 mins

STEP

4

30-60 mins

STEP

5

30-60 mins

What's the process?

Ooo la la, love when people ask this. Why? **1) We know tech** & use it wisely; **2) We're organized** & have refined our processes. **3) We're human**—with a priority to help the middle-class & under-represented. Here's how...

Complete basic form

Receive link to an online form · Answer a few basic questions · No account numbers or socials needed · All ready for our 1st meeting

We meet

Discuss your intake form · Determine your goals · Answer your questions

Review your draft

Receive your draft plan in a week · Review your plan (we include time-saving summaries to make this doable)

Meet again

Review plan together · Answer your questions · Finalize your plan · Identify any post-planning steps

Finalize, sign & pay

Drive-through notaries all over · Sign & pay · Complete any post-planning steps on your time

5

Who are the key players?

Three roles—*trustee, guardian & health care agent*. People you trust to do these things after you pass or become debilitated:

Trustee

- ✓ **Collect assets**, pay debts, record all transactions
- ✓ **Hire people** like real estate agents & attorneys if needed
- ✓ **Reserve conflicts** & claims made by others
- ✓ **Distribute assets** as per your wishes
- ✓ **Pay them a bit** for their help, say 1.5% of the estate

Guardian

- ✓ **Person in charge** of the day-to-day
- ✓ **Willing to do** the job damn well
- ✓ **Healthy & young** enough till the kids turn 18
- ✓ **Can be local**—or not
- ✓ **Can also be** the trustee

Health Care Agent

- ✓ **Make medical decisions** on your behalf—if you can't

Pretty straight-forward, right? So long as you have an estate plan to direct those key roles. That's what we'll create together.

6

Anything else I should look out for?

Well, got...

- ✓ **Kids with special needs**—mental, emotional or physical?
- ✓ **International family members** to bring here?
- ✓ **Non-traditional family needs**, say not married or no kids?
- ✓ **Own properties**—alone or with others?
- ✓ **Family members struggling** to care for themselves?

We're here to talk openly & find the right plan to take care of any or all of these real situations affecting real people.

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Why Summerall Law?



Captain Schnuggles

Kids love 'Capi' in the Oakland office

'Cause we got the Captain? Maybe. But for sure because...

- ✓ **15+ years**, 100s of testimonials, 1000s of completed plans
- ✓ **Trusted by** professors, doctors, lawyers, teachers & other pros
- ✓ **Clear pricing**, simple process, affordable amendments
- ✓ **More Trust options** offered only by us—making life easier
- ✓ **Better plans** with better processes & organized lawyers
- ✓ **Free consultation** to see if we're a fit
- ✓ **Loads of great scores & reviews** on Yelp & Google

[Read Yelp Reviews](#)

[Read Google Reviews](#)

[Read Arrivala Reviews](#)

BONUS

What's a "Special Needs Trust"?

And why should I care?

It's how you **protect loved ones with special needs**—which is beyond the typical trust:

- ✓ **Continue government** benefits
- ✓ **Continue medical** programs
- ✓ **Continue psychological** care
- ✓ **Continue special housing** needs
- ✓ **Continue whatever they're getting now**—with no lapses
- ✓ **Transfer estate money** to your loved ones
- ✓ **Spend no money** to achieve all the above

Because these trusts are so important...

We provide them—at no additional cost with our services.

**Question
for you...**

Like what you learned?

Want to learn more about *getting your affairs in order*? To live with peace-of-mind? Knowing you took care of your loved ones?

BOOK COMPLIMENTARY CALL

Or visit us at summeralllaw.com