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LEGACY TRUST PACKAGE

Best for: Homeowners, business owners, higher-net-worth families

Why do you, a Homeowner, Business Owner, or High-Net-Worth Family, need a Legacy Trust Package?

- Your estate could face the public, lengthy, and expensive probate court process.
- Without a trust, your private financial and business assets become matters of public record.
- Real estate and business holdings can become frozen during transition, disrupting operations.
- Unmanaged transfers can expose your wealth to heavy unnecessary losses and delays.

Package Inclusions:

Revocable Living Trust

A powerful, private estate planning tool that holds your real estate, business interests, and assets, allowing you to maintain full control during your lifetime and pass them seamlessly to heirs without probate.

Pour-Over Will

A specialized safety-net will that automatically "pours" any misplaced or newly acquired assets directly into your living trust upon your passing, ensuring total alignment.

Financial & Healthcare Powers of Attorney

Crucial safeguards that authorize trusted individuals to manage your business/financial affairs and make medical decisions if you ever become incapacitated.

Living Will

A formal directive that clearly states your explicit choices regarding life-sustaining medical treatments, eliminating guesswork and stress for your family.

Asset Funding Guidance

Step-by-step professional instructions and support to successfully transfer your real estate, accounts, and business titles into your trust so it is fully active and protected.

Annual Review

A recurring yearly check-in to adjust your trust for any major life changes, new property purchases, tax law shifts, or business updates, keeping your plan completely bulletproof.

To know more about this package, please call, visit or message us.



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