

## Expert advice to guide and protect your family's path.

### ESTATE PLAN REVIEW

#### Detailed review of your existing Estate Planning documents:

- Review existing documents
- Illustrate key points of your Estate Plan in a flowchart and summary
- Ownership, trustee/executor, and beneficiary review
- Estate and gift tax calculations

### ESTATE DOCUMENT DRAFTING<sup>1</sup>

#### Prepare and/or refresh, then execute your baseline Estate Planning documents:

- Wills
- Revocable Trusts
- Irrevocable Life Insurance Trust
- Powers of Attorney
- Living will and Advance Medical Directives

#### Additional advanced Estate Planning documents may include:

- Dynasty Trust, Grantor-Retained Annuity Trust ("GRAT"), Family Limited Partnership or LLC, Private Annuity, Charitable Remainder Trust, Charitable Supporting Organization, Charitable Family Foundation, Charitable Lead Trust, Intentionally Defective Irrevocable Trust (IDIT) Installment Sale, Grantor Retained Income Trust (GRIT)/Qualified Personal Residence Trust (QPRT), Self-Canceling Installment Note (SCIN), Individual Retirement Account (IRA) Legacy Trust

### TRUST AND ESTATE PLANNING

#### Coordinated support from Legal, Planning, Tax and your Family Coach to best position you for:

- Life-changing events, such as business transactions, inheritance, birth of children/grandchildren, marriage, divorce or death
- Wealth transfer, charitable planning, and legacy planning
- Potential tax minimization strategies
- Estate Gift and Generation Skipping Transfer ("GST") tax planning

#### Review and evaluate your business transactional documents, including:

- Business formation, business sale, investment documents
- Transaction structuring and advisory

### SPECIALIZED CONSULTING<sup>1</sup>

#### Legal consulting for special circumstances:

- Special Needs Trust planning for family members with physical, developmental, behavioral/emotional or sensory impairment disorders
- Consulting for same-sex or unmarried couples

<sup>1</sup> Client must sign Engagement Letter with outside law firm. The Engagement Letter covers the duration you are a Cresset client.