

The Estate Planning Portfolio includes:

1. **Revocable Living Trust:** The document that spells out your requirement to transfer your estate to your beneficiaries. The trust assets avoid probate.
2. **Certificate of Trust:** A summary document of information from the revocable living trust that an outside company needs to transact business with the trust.
3. **Living Will:** A statement of your desire to not be artificially sustained when certain death would occur if not for the use of machines to keep one's body functioning.
4. **Power of Attorney for Assets:** This document will give your appointed agent the power to make basic financial decisions upon your incapacitation only over those assets that have not been funded into your trust.
5. **Power of Attorney for Health Care:** This document allows your appointed agent to make important health care decisions for you in lieu of your own decisions, in the event of your incapacitation.
6. **Durable HIPAA Statement:** Consent to full disclosure of any and all medical records to my agents per the health care privacy issues addressed by federal regulations.
7. **Will:** This document, when used in conjunction with your living trust, is a "Pour-over Will" that transfers your unfunded property into your trust at death and after probate.
8. **Administrative Documents:** These documents/forms are designed for ease of administration for you now, as trustee, and convenience for your successor trustee to use as needed in the future.
9. **Instructions:** This has been designed as a directive for trustee duties and functions to be performed at different administrative phases of your trust. It provides directive on how to operate your trust while living and instructions on how to settle the trust at your death
10. **Funding the Trust:** We assist you in transferring your assets into the trust. One realty transfer deed is included in the base price.
11. **Attorney Review:** Included in the fee, an attorney will represent you.
12. **Integrated Trust Systems:** An experienced company that has created over 15,000 estate plans nationally will draft your documents.