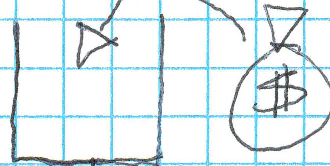
Plans That Work ≠ Magic Book
Plans that Care = Education

Alive & Well



How do we make sure all assets are in the trust?
- verifications from financial institutions
- Asset Review Reports

Is something missing from asset report?
- if yes, firm doesn't know about asset

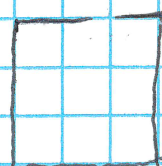
Not funded per client (NFPC) - why?

individual ownership = Will = Probate
title > documents

probate: 12-18 month process fully public, attorney fees ≈ 3 1/2 %
Even one asset outside of trust can cause a probate.

2024: 122/650 asset reports not returned

Disability



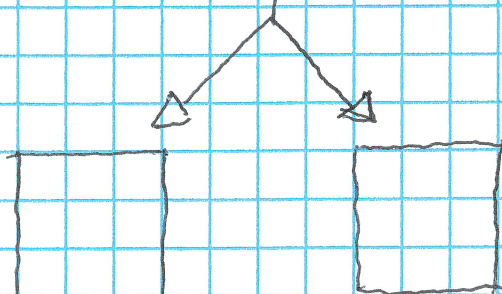
helpers wear lots of hats
- health care agent, successor trustee, child, spouse, caregiver

"I Love Lucy" syndrome

"I need the power of attorney!"
vs. Disability Trustee

Where/When can my helpers get training and education?
Family meeting, Annual Client Meetings, Client Update Program, What to Do workshop, Education Day, summer workshops, etc.
Invite helpers, family, & advisors

After Death



There is no magic book
But, there is also not a magic phone

"Call the Firm" "Call Scott"

Great advice, but not a substitute for education & training