Three Levels of Planning

Level 1
The **Family** Plan

For the Family Who… wants to guarantee that their minor children are well cared for no matter what, that their health care wishes are turned into directives and that their loved ones are able to access their assets using a durable power of attorney if they become incapacitated. This plan is appropriate for the family with minor children who does not have any assets that would be subject to the Probate court process at death.

Your Family Plan begins with a Family Emergency Response Plan that ensures your children will never spend a minute in foster care and provides detailed instructions regarding every phase of your children's lives to the people that will be caring for your children. Your Family Plan also includes Basic Wills, Health Care Directives and Powers of Attorney.

Level 2
The **Trust** Plan

For the Family Who… wants the total assurance and peace of mind of knowing that in the event of their death or incapacity, all assets will be transferred to heirs with the most ease and convenience possible in the privacy of our own office and the court will not be involved at all in the transfer of their assets to their heirs. Clients choosing this plan may also opt to protect their beneficiary's inheritance from lawsuits, spouses and estate taxes.

Your Trust Plan is a trust-based plan that gives you the peace of mind of knowing that we are here for your family in the event of your death or incapacity, so they know just where to go and what to do. The Trust Plan also includes Wills, Health Care Directives, and Powers of Attorney so that you know that you are well taken care of in addition to your assets. We prepare one real property deed transfer; all other asset transfers will be handled by you, with guidance from us.

Level 3
The **Wealth** Plan

For the Family Who… wants the total assurance and peace of mind of the Trust Plan **and** also want all the comfort of knowing that all your assets transfers have been taken care of by our office. This plan is appropriate for busy families who want the least amount of personal effort and the greatest amount of convenience and care! **We do it all for You!**

Your Wealth Plan includes all the components of the Trust Plan, **plus** we analyze how each of your assets is titled or designated and give you the comfort of knowing that all transfers are completed accurately. We will prepare an asset spreadsheet confirming what you own and how it is held and we will then complete all of the paperwork necessary to transfer every asset and designate every beneficiary for the maximum protection possible.

Our clients choose their own fees depending on their particular goals and objectives. The listed ranges are for married couples, singles receive a $500 discount. Please note that the fee may be higher under certain circumstances, such as when we plan for special needs beneficiaries or non-citizen spouses, or when we do advanced planning. We will let you know what the planning options cost, so you can make an informed decision.

Morgan Law Group 1500 Quail Street #540 • Newport Beach, CA 92660 • Phone: 949.260.1400 • Fax: 949.260.1401 • www.MorganLawGroup.com