Assisted Trust Plan

REVOCABLE LIVING TRUST

A basic trust document addressing the average needs for avoiding probate, transferring assets, and holding title or beneficial interest in your property. More advanced documents if needed would incur an additional cost.

LAST WILL AND TESTAMENT

A special type of Will known as a Pour Over Will, which allows assets held outside of the trust at death to be poured into the trust by a court, ensuring that they will be distributed according to your trust.

FINANCIAL POWER OF ATTORNEY

A document allowing someone you trust to manage your accounts, assets, and important decisions for you in the case of emergencies such as incapacity.

HEALTH CARE DOCUMENTS

We include a medical power of attorney or health care proxy allowing someone you trust to make medical decisions for you in the case of emergencies or incapacity as well as a living Will or health care directive for end of life and life support decisions, and a HIPAA authorization to allow loved ones to receive important medical information in the case of an emergency.

MOBILE OR VIRTUAL NOTARY

We send you the documents, signing instructions and contact information for a pre-paid notary service to meet with you and finalize signing and executing your documents

FUNDING ASSISTANCE

We assist you in preparing transfer documents for your primary residence and assignments of interests for businesses and personal property to your trust. Additional real estate transfer documents can be prepared for $100 per property.

OPTION 1:
$997

OPTION 2:
$50/month
24 months

Please Contact:

*Partnered with Wealth Within Your Reach® Financial

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