OUR LEGACY WEALTH PLAN CONTENTS

Living Trust Estate Plans include the following documents and services.

Estate Planning Portfolio	An attractive and durable binder to organize legal documents and information that will be useful to your Trustees and Power of Attorney Agents.
Revocable Living Trust Agreement(s) (Legacy Wealth Trust)	Built on Legacy Wealth Planning concepts to protect both financial and non-financial legacies/wealth. Avoids Living Probate and Death Probate, saves federal estate taxes, customizes your inheritance plan. May be a joint trust or separate for each spouse if you are married. **The trust options at pages 18 to 19 are included at no extra cost.**
Funding and Title Transfer Documents and Instructions	Personalized documents for your assets and accounts to be retitled to trust name, or to make beneficiary changes. We process most of the funding for you and provide simple documents for you to complete the rest. Includes instructions for accounts and property you acquire in the future.
Trust Information Page	Information at a glance about the estate planning documents and asset titling; Trust Diagram that shows in picture format how trust operates.
Trust Identification Cards	ID cards for use at financial institutions and to give to your future Trustees and POA Agents about who to call in the future if something were to happen to you.
Pour Over Will	Transfers to trust any assets titled to your name at death; a “safety net” for trust. Names guardian for minor children. Revokes old will.
Property Power of Attorney	Appoints your legal agents to serve if you are incapacitated.
Living Will and “Living Will Supplement”	Living Will declares wishes about termination of life support if terminally ill. Our Living Will Supplement gives more definition to the Living Will.
Health Care Power of Attorney	Appoints agents to make health care decisions if you are unable due to incapacitation.
HIPAA Authorization for Release of Protected Health Information	Medical privacy laws restrict release of medical information. This form allows your fiduciaries and others you name to secure your medical information for use in your care and to activate certain documents.
Trust Affidavits	Trust summary and excerpts of selected language to "prove-up" the trust. Up to three affidavits are provided, as needed.
Estate Planning Letter and My Legacy Book	For special distributions of items of personal property, burial and funeral instructions. A book to share your stories, your life, your legacy.
Tenancy in Common Agreement	Changes joint tenancy assets to Tenancy in Common to fund the trust. A Separate Property Agreement is provided if needed (married clients).
Life Insurance Summary	To record information for all life insurance.
Location List & Family Information	States where important documents are located and people to notify in case of death or incapacitation.
Anatomical Gift	Authorizes organ and tissue donations.
Glossary	Explains legal terms in plain English.
Trustee Instructions	Trustee checklist of responsibilities and Special Reports on settling a trust.

Effective 1/22/19. Subject to change without notice.

ZLF ELDER LAW | ESTATE PLANNING CONTINUUM OF CARE

We aim to foster lifelong relationships with clients and their family. In pursuit of this goal, the following are the services we include with revocable Living Trust estate plans we prepare, at no additional cost, unless indicated otherwise:*

FREE phone calls. No charge for phone calls with questions concerning the design of your estate plan, funding of your living trust, or general questions about your estate planning.

We Fund Your Trust. We prepare and mail forms and documents needed to register your trust with your assets or establish beneficiaries to coordinate with the trust.*

Money-Back Guarantee. When we deliver your legal documents, if you are not happy with our services, we will refund your fees.*

Document Review and Change Period. You can make adjustments to your estate planning documents for 90 days after we deliver them to you, at no cost.

Law-Change Protection; Notification of Future Law Changes. If law changes or developments occur within three months of retaining our services, we will update your estate plan documents at no cost. After that, we provide courtesy notices about significant legal developments that may affect your planning, and what is needed to update your documents. Additional costs may be required to update plans. Reduced fees are offered to existing clients.

Estate Plan Checkups. We reach out to you approximately every three years to set up a complimentary Trust Review, (or sooner if requested), so you can stay current.

Medicaid Asset Protection Assessment. We will assess whether a Medicaid Protection Trust will shelter assets from legal spend-down requirements to become eligible for public benefits such as Medicaid or VA Aid and Attendance, upon request

Support after the Death or Incapacity of a Trustmaker. We meet with the Trustee(s) in charge at no cost to explain what legal or tax steps need to be taken, and to review the deceased or incapacitated client's affairs. We secure an EIN for the Trust, provide the Affidavits that may be needed to trigger the trust, a written guide to a Trustee’s responsibilities and authorities, and an explanation of what actions must be taken in your particular case. If legal services are needed, we will quote what our charges would be to assist the Trustee(s) in settling the estate.

Client Education Program. We produce a unique **Trustee And Power Of Attorney School** that educates future fiduciaries and clients about tools of an estate plan, how they work, what to do, when to act, and much more. We have other education events on special interest topics; offer a library of free reports on estate planning; and regularly publish blogs .

DocuBank Membership. We provide a one-year enrollment in DocuBank for new clients. DocuBank makes your Living Will, Durable Health Care Power of Attorney, and HIPAA Authorization instantly available in the event of a medical emergency, at any time or place. An additional four years’ coverage is available at reduced cost.

Interactive Website. **www.zimmerlawfirm.com** Rich in content and constantly updated.

My Legacy Book. A record of your non-financial legacy for heirs and future generations.

American Academy of Estate Planning Attorneys. Only Southwestern Ohio member in this limited-membership national organization of attorneys who concentrate in estate planning.

Advanced Planning. Estate taxes, multi-generation wealth transfers, asset protection, and more.

**Effective 8/1/2016, subject to change without notice. Items marked with * are subject to specific terms and conditions.*