Estate Planning Packages

The Socius Law Firm offers various estate planning packages that offer varying levels of protection suited to your personal goals and objectives. The four levels of estate planning are summarized below.

FAMILY PLAN (Level 1)	**TRUST PLAN (Level 2)**	**WEALTH PLAN (Level 3)**	**LEGACY PLAN (Level 4)**
<<<<<<<<<<<<<<<<<<<FOUNDATIONAL ESTATE PLANNING >>>>>>>>>>>>>>>>>>>>>			**<<ADVANCED PLANNING>>**
For the family who wants to take care of their basic estate planning needs and is not concerned about avoiding probate or privacy of their affairs.	For the family who wants to avoid probate and the total assurance and peace of mind 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. Clients choosing the TRUST Plan may opt to include strategies to protect their beneficiaries' inheritances from lawsuits, creditors, predators and divorce and strategies to minimize or eliminate estate taxes.	For the family who wants the total assurance and peace of mind of the TRUST Plan as well as the added comfort of knowing that all assets transfers are 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.	For the family who needs more than the foundational planning of the first three levels. Clients choosing the LEGACY Plan may have advanced planning needs involving complicated estate tax or asset protection issues.
Provides a basic will naming those that will receive your assets through the court administered probate process and provides peace of mind knowing we are here to help you navigate the system during your life and to help your family after you are gone. The FAMILY Plan also includes Health Care Directives, Powers of Attorney and a Kids' Safeguard Plan to ensure minor children will always be taken care of by the people you want, in the way you want, and never put in a situation you wouldn't like.	Provides everything in the FAMILY Plan, plus a Revocable Living Trust that allows your heirs to avoid the frustration, delays, public scrutiny and unnecessary expense associated with Probate Court involvement. In the event you become incapacitated, your affairs can be privately managed by the people you choose. The TRUST Plan also offers ongoing guidance during your life and counsel for your family after your death.	Provides all 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 transfers are completed accurately. We will prepare an asset inventory report confirming what you own and how you own it and then complete all the forms and other documents necessary to initially fund your trust and designate beneficiaries.	Depending on your family's needs, the LEGACY plan may include additional trusts for life insurance and/or IRAs. Additionally, the LEGACY plan can provide for your beneficiaries with special needs and has the most flexibility for charitable giving.
Includes: ✓ Basic Will ✓ Durable Power of Attorney ✓ Health Care Proxy ✓ Living Will ✓ HIPAA Release ✓ Kids' Safeguard Plan ✓ EP Portfolio & Thumb Drive	**Includes FAMILY Plan and:** ✓ Revocable Living Trust ✓ Trust Summary & Diagram ✓ Trust Funding Assistance ✓ Funding Instructions ✓ Assignment of Property ✓ Certificate of Trust ✓ Personal Property Memo ✓ Memorial Instructions ✓ Three-Year Review Meeting	**Includes TRUST Plan and:** ✓ Full Initial Trust Funding Services	**May include:** ✓ ILIT ✓ Retirement Trust ✓ Special Needs Planning ✓ Medicaid Planning ✓ Charitable Planning