

## Forward-thinking estate planning in Durham, N.C.

We work with clients at their pace to create a plan to set them at ease for their future. Call today for a free phone consultation.

The Basic Planner	The Careful Planner	The Ultimate Planner
For the self-reliant planner who is comfortable interacting with a North Carolina-licensed lawyer through web forms, online portals, and email. We provide documents tailored to your unique situation, and you arrange to sign them on your own schedule.	For those who want a higher level of guidance and personal touch. Through in-office consultation, you will receive information on the full landscape of estate planning options and advice on your personal and family situation.	For the client wanting to spare loved ones the hassle and expense of probate after death. Jeff works with you to develop a trust-planning solution that can protect your bequest from creditors, leave assets to a disabled family member, and protect you late in life.

Single \$650, Couple \$950

Single \$1,750, Couple \$2,250

Single \$3,750, Couple \$4,750

Products	The Basic Planner	The Careful Planner	The Ultimate Planner
Will	✓	✓	✓
Power of Attorney	✓	✓	✓
Health Care Power of Attorney	✓	✓	✓
Medical Records Release	✓	✓	✓
Living Will	✓	✓	✓
Revocable Living Trust			✓
Services			
File in appropriate government offices		✓	✓
Guidance in reviewing your beneficiary designations		✓	✓
Phone consults with your CPA and financial advisor		✓	✓
Free amendments within one year			✓
Annual family consults for five years			✓
Transfer up to three NC property deeds to a trust			✓
Transfer up to three vehicles to a trust			✓