



Estate Planning Portfolio

- Revocable Living Trust, Certificate of Trust
- Powers of Attorney - Assets and Health
- Living Will - Advance Medical Directives
- Pour Over Will, Administrative Documents
- Deed(s) transferring Real Estate into Trust

Business Planning - LLCs

- Articles of Organization - filing and publication
- Operating Agreement, Meeting Minutes
- Bank Resolutions, EIN application, Company Seal
- Buy-Sell Agreements - Life and Disability

IRA Distribution Planning

- IRA Beneficiary Trusts - Accumulation to Conduit
- Controls distributions, avoids disinheritance heirs
- Protects IRA from creditors, lawsuits and divorces



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