Life Planning Group, LLC

Trust Shopper's Comparison Guide

Our documents include:

- ______ Multi-generational asset protection for beneficiaries using protective sub-trusts and 'special independent trustees'
- ______ Survivor's control ~ giving survivor minimum, medium or maximum control over making changes to the 'B' Trust
- ______ Separate trusteeships for A & B Trusts at 1st or 2nd deaths
- ______ HIPAA provisions ~ in Trust & Powers of Attorney
- ______ Pure Conduit IRA provisions ~ maximum control, tax deferral
- ______ Spendthrift, special needs and no-contest provisions
- ______ Specific gifts ~ joint and separate @ 1st and 2nd deaths
- ______ Specific ultimate beneficiaries with contingent distribution
- ______ Custom 'life estate' in real estate for survivor
- ______ Digital Asset Rights provisions
- ______ Amendment, notice, disclaimer & release forms ~ admin. docs
- ______ Qualified sub-Chapter 'S' Corporation provisions
- ______ Conflict resolution ~ arbitration vs. lawsuits
- ______ Successor Trustee's Specific Limited Powers to Amend Trust
- ______ Complete 'funding' of assets ~ all real estate, corporations, LLCs and financial assets transferred into Trust
- ______ No financial products are ever presented or offered for sale

For more information, please call

(877) 438-7878

http://www.lifeplangroup.net

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