



#### **CLIENT DISCLOSURE:**

**Life Planning Group, LLC** ('LPG') is an **Arizona Certified Legal Document Preparer** (AZCLDP #81386), authorized by the AZ Supreme Court to provide legal information and legal document preparation services. LPG is not a law firm, its representatives are not lawyers, and they do not give legal advice of any kind. All client information is treated as confidential, but not *privileged* information.

## **Estate Planning Portfolio**

### **Revocable Living Trust**

- ✓ Avoids Probate; says who gets what, how and when; protects assets for future generations; avoids contests; provides for special needs

### **Certificate of Trust**

- ✓ Proves trust's existence for banks, brokerage, insurance companies

### **Powers of Attorney (Assets and Health)**

- ✓ Names and empowers the people we trust to make financial and healthcare decisions for us if we become incapacitated

### **Living Will**

- ✓ Declares our wishes re. Life Support in the event of terminal illness, persistent vegetative state or coma – allows Agent to 'pull the plug'

### **Pour Over Will**

- ✓ Serves as safety net for assets that have been left out of the Trust; allows Executor to 'pour over' into the Trust any forgotten assets

### **Administrative Documents**

- ✓ Transitional Documents that may be needed in the future

### **Funding Letters**

- ✓ Letters to banks, brokerage, insurance companies requesting the transfer of ownership or beneficiary designation to the Trust

### **Warranty Deeds, Corporate and LLC Amendments**

- ✓ Transfers Real Estate into Trust; Transfers LLC and Corporate ownership interests into Trust



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## **Business Planning - LLCs**

### **Articles of Organization - expedited filing**

- ✓ Filed with the Corporation Commission, creates the LLC; lists the Members (owners) and the Statutory Agent

### **Publication of Articles**

- ✓ Articles of Organization must be published 3x to complete the process

### **Operating Agreement**

- ✓ Operating Agreement spells out the rights and duties of participants; voting procedures; share of profits and losses; sale/transfer of interests

### **Organizational Meeting Minutes**

- ✓ Initial meeting of Members and Managers; breathes life into the LLC; allows Managers to take certain actions on behalf of the LLC

### **Bank Resolutions, EIN application**

- ✓ Allows Managers (and Authorized Persons) to open bank accounts and conduct banking business on behalf of the LLC; EIN = LLC Tax ID #

### **Member/Manager Ledgers**

- ✓ Lists the names and addresses of Members and Managers

### **Ownership Interest Ledger and Certificates**

- ✓ 'Stock' Certificates indicating who owns the LLC Ownership Interests

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