

Hoopes, Adams & Scharber, PLC

BUSINESS TRANSACTIONS • TRUST AND ESTATE LAW

An Estate Plan Tailored to Your Needs

Each of these planning levels can be uniquely structured to reflect your situation and objectives

	Family Will Plan	Trust Plan	Wealth Plan
YOUR SITUATION	<p>You own assets that are all located in Arizona, have a spouse and /or minor or adult children</p> <p>Estate taxes are not a consideration, and your assets are relatively simple</p>	<p>You own assets that would be subject to probate, and you want your assets transferred to your heirs easily, conveniently, and without court involvement</p> <p>You are subject to estate tax, or your assets include business interests or out of state real estate</p>	<p>You own assets that would be subject to probate</p> <p>You want your assets transferred to your heirs without the involvement of the courts</p> <p>In managing your assets, you want the greatest amount of convenience and care</p>
YOUR OBJECTIVES	<p>Your minor children will be well cared for if you die or are become incapacitated</p> <p>Your health care wishes are expressed in binding directives</p> <p>If you become incapacitated, your loved ones can access your assets in order to provide for your care</p>	<p><i>Similar to the Family Plan, plus the following objective:</i></p> <p>Your heirs' inheritance will be protected from estate taxes, lawsuits, and claims by third parties, including divorcing spouses, bankruptcy, or medical bills</p>	<p><i>Same as the Trust Plan</i></p>
PLAN FEATURES	<p>Basic wills</p> <p>Testamentary trusts, if needed, for the protection of minor children</p> <p>Health care powers of attorney and living wills to ensure that your medical treatment and care wishes are honored</p> <p>General (durable) powers of attorney to allow access to assets in if you are incapacitated</p>	<p><i>All of the features of the Will Plan, plus:</i></p> <p>Guidance from your Hoopes, Adams & Scharber attorney on how to transfer your assets into your trust</p> <p>The peace of mind gained from knowing that, in the event of your death or incapacity, your Hoopes, Adams & Scharber attorney is available to advise your family members about how to care for you and your assets</p>	<p><i>All of the features of the Trust Plan, plus:</i></p> <p>Professional inventory and analysis of your assets, to confirm what you own and how it is held</p> <p>Assistance in identifying assets that should be owned by your trust</p> <p>Assistance in identifying your trust's beneficiaries and designating the assets that they are to receive</p>
FEE RANGE	\$1,250-\$1,750**	\$2,500 - \$4,500**	\$4,500 - \$6,000

** Plus \$175 for Deed Creation and Recording