

Great Families Plan For Great Futures

Who Are You Planning For? SM



Meier Law Firm's Estate Planning Packages

Your family is unique and special. We know you want to be there for them and protect them no matter what happens in life. That's why we created three unique estate planning packages we custom design to meet your family's unique needs and goals, so your family will always be taken care of no matter what.

The Family Plan

The Family Plan is a will-based plan perfect for families who do not have a lot of assets, but who want to ensure their kids will be raised by the people they want, that their money will go to who they want, that their medical wishes will be clear, and their legacy will be preserved.

The Trust Plan

The Trust Plan is a trust-based plan perfect for families who want to avoid the costs and hassle of probate court, ensure that their home and assets will be transferred privately when they want and to who they want, that their kids will be raised by the people they want, that their medical wishes will be clear, and their legacy will be preserved.

The Wealth Plan

The Wealth Plan is perfect for families who want the Trust Plan, and also want our Firm to analyze and transfer all of their property and assets into their trust for them.

A Plan That Works

Legal documents alone are not enough to make an estate plan work. That's why Meier Law Firm provides families custom-designed legal documents reflecting their unique family's needs and wishes; assistance with properly transferring their home and assets into their trust; a strategy to keep their plan up to date, and a lifelong relationship with us that they can count on throughout all of life's changes. Let us help your family create a plan today.

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Services Included In All Plans

- All meetings, phone calls, and emails with attorney and staff during your planning process.
- Special techniques for helping parents decide who will raise their kids and manage their money.
- Enrollment in an online database providing easy access to health care directives.
- One-hour audio recorded Legacy Interview that preserves your memories, values, and dreams.
- Leather bound estate plan and CD with all estate plan documents in PDF form.
- Free review of your estate plan every three years.
- Private network of referrals to top financial planners, CPAs, and other trusted advisors.
- Lifelong relationship with your family attorney.

Custom Documents Included In Each Plan

The Family Plan

\$1,500

- Will(s)
- Power of Attorney(s)
- Living Will(s)
- HIPAA Authorization(s)
- Health Care Directive(s)
- Memorial Instructions

The Trust Plan

\$3,000-\$5,000

- Living Trust
- Will(s)
- Power of Attorney(s)
- Living Will(s)
- HIPAA Authorization(s)
- Health Care Directive(s)
- Property Memorandum(s)
- Memorial Instructions
- Trust Summary
- Trust Certificate and Affidavit
- Trust Transfer Deed (for primary residence in CA)

The Wealth Plan

Cost of Trust Plan, plus \$1,500+

- Living Trust
- Will(s)
- Power of Attorney(s)
- Living Will(s)
- HIPAA Authorization(s)
- Health Care Directive(s)
- Property Memorandum(s)
- Memorial Instructions
- Trust Summary
- Trust Certificate and Affidavit
- Trust Transfer Deed (for primary residence in CA)
- Property and Assets Analysis
- Complete Transfer of All Assets

Additional Services

Meier Law Firm also offers trust review and amendments, special needs trusts, business planning, and tax planning for high net-worth families.