

Custom Estate Plans



MEIER LAW FIRM
NEWPORT ELDER LAW
Trusts • Asset Protection • Special Needs

Our thoughtful estate planning packages provide varying levels of protection, suited to your unique needs and goals.

LEVEL ONE



FAMILY PLAN

For the Family who...

Doesn't have assets subject to the court process called probate, but does want to guarantee their minor children are well cared for no matter what, their health care wishes are turned into directives, and their loved ones can access their assets using a durable power of attorney if they become incapacitated.

Your Family Plan...

Is a will-based plan that provides the peace of mind of knowing we are here to help you navigate the system during life and for your family after you are gone.

The Family Plan also includes Health Care Directives and Powers of Attorney so that you know that you are well taken care of if anything happens as well as a Kids Emergency Plan to ensure your children are always raised by the people you want, in the way you want, and never taken out of your home by the authorities.

Fee Level: \$2,500

LEVEL TWO



TRUST PLAN

For the Family who...

Wants the total assurance and peace of mind of knowing Family assets will be transferred to heirs with the most ease and convenience possible in the privacy of our office without court involvement.

Clients choosing the Trust Plan may also opt to protect their beneficiary's inheritance from lawsuits, spouses, and estate taxes.

Your Trust Plan...

Is a trust-based plan that provides the peace of mind of knowing we are here to help you navigate the system during life and for your family after you are gone.

The Trust Plan also includes Wills, Health Care Directives, and Powers of Attorney so you and your assets are well taken care of.

You handle all asset transfers (except primary residence) with our unlimited guidance and support. The Kids Emergency Plan may also be included to ensure your children are never taken from your home and are raised by the people you want.

Fee Level: \$4,500-\$6,500

LEVEL THREE



CONCIERGE PLAN

For the Family who...

Wants the total assurance and peace of mind of the Trust Plan AND also all comfort of knowing that assets transfers have been taken care of by our office.

This plan is appropriate for busy families who want the least amount of personal effort and the greatest amount of convenience and care.

We do it all for you!

Your Concierge Plan...

Includes all the components of the Trust Plan, plus we analyze how each of your assets is titled and designated and give you the comfort of knowing that all transfers are completed accurately.

We also prepare an asset spreadsheet confirming what you own and how it is held, and complete all of the paperwork necessary to transfer every asset and designate every beneficiary for the maximum protection possible.

Fee Level: \$6,500-\$8,500+

Fourth Level—Beyond the Revocable Living Trust

BEYOND THE REVOCABLE LIVING TRUST



Fee Level: *Prices vary depending on service. Fee quoted following assessment and before client engagement.