

# OUR EASY FOUR STEP PLANNING PROCESS



MEIER LAW FIRM  
Trusts • Asset Protection • Special Needs

Our **Easy Four-Step Planning Process** guarantees that in just six weeks, your Family will have a custom plan for a great future, that protects your assets and loved ones no matter what!

## STEP ONE



**Attend Your Planning Session**



**Select and Design Your Custom Estate Planning Package**

## STEP TWO



**Provide Contact Information**



**Complete Family Wealth Inventory**



**Complete Virtual Asset Instructions Letter**

## STEP THREE



**Review and Sign Your Custom Estate Plan**



**Trust Funding**



**Consult with Other Trusted Advisors**

## STEP FOUR



**Receive Your Final Custom Estate Plan**



**Record Legacy Interview**



**Client Experience Review**

**Your Peace of Mind and Total Protection—Guaranteed!**