



1415 Hanover Street (Rte. 139)
Hanover, MA 02339
781-871-7526 (PLAN)

“3 STEP PROCESS”



Step 1:



Design your Trust
Create your Trust
Sign your Trust



Step 2:



Trust Funding
Asset Titling
Fill your Treasure Chest



Step 3:



Client Care Plan
Keep a Good Eye on your Treasure Chest for the 3 L's
(Changes in Law, Life, and Learning)
Annual Reviews
Pass Treasure Chest to Your Loved Ones!

**AVOID THE
FOUR HEADED MONSTER;**

Probate Court Estate “death” tax
Financial Creditors/Predators Nursing Homes



YES!



SAVINGS

If you plan you won't have to pay :

Based on a 1 million dollar estate

\$50,000.00 to the probate court

\$40,000.00 to the state in taxes

Savings of \$15,000 per month in nursing home costs
or \$540,000 over three years.



YOUR LEGACY

How will you be remembered?

How will that make you feel?

