

PREFERRED WILL AND LIVING TRUST PLANSM

SUMMARY OF PLAN COVERAGE, BENEFITS AND FEES

ALL ESTATE PLANNING SERVICES
ARE PERSONALIZED FOR YOUR NEEDS
AND THE NEEDS OF YOUR LOVED ONES

**Single Person or
Married Couple**

Will &
Living Trust
Plan

Initial Consultation with an experienced Estate Planning Attorney	Included
Living Trust	Included
Will (Pour-over)	Included
Living Will	Included
Durable Power of Attorney for Health Care Decisions	Included
Durable General Power of Attorney	Included
Deed(s)	Included
Bill of Sale and Revocable Assignment	Included
Final Meeting with your Estate Planning Attorney to execute your documents and implement your Estate Plan	Included
Follow-up Phone Calls to your Estate Planning Attorney at no additional cost for ninety days	Included
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Total Normal Fee	\$1,950
Less: 50% off Plan Allowance for qualified referrals who (a) are residents of Missouri or Kansas, (b) agree to meet at an approved location in the greater Kansas City, St. Louis or Wichita areas, and (c) implement a comprehensive estate plan as set forth above.	
Total Final Fee *	<u>- 975</u> \$ 975

* For clients with cash-flow concerns, interest-free payments can be made in the amount of \$325.00 per month.

The O'Malley Law Firm

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PLEASE NOTE: The sponsor(s) of the **Preferred Will and Living Trust Plan** and the attorney provider(s) under the **Plan** (a) are independent of each other, and (b) are each solely responsible for, and do not pay any compensation to each other with respect to, any advice, products and/or services provided by their respective organizations, representatives and/or affiliates.

THE PLAN IS EFFECTIVE FOR QUALIFIED REFERRALS WHO HAVE THEIR INITIAL CONSULTATION IN 2015.

The choice of an attorney is an important decision and should not be based solely upon advertisements.

(SEE THE REVERSE SIDE FOR "ADDITIONAL PLAN INFORMATION")

PREFERRED WILL AND LIVING TRUST PLANSM

ADDITIONAL PLAN INFORMATION

Initial Consultation – An experienced estate planning attorney will meet with you at a mutually agreeable time and location to discuss your Will, Living Trust and other estate planning options. The attorney will (a) review with you the information gathered by you in preparation for your initial consultation, and (b) assist you in making all of the important decisions to develop your personalized estate plan.

Living Trust - (a) allows you to keep complete control over your assets while you are able to do so, (b) allows your heirs to Avoid Probate at your death, (c) provides for the orderly distribution of your assets at your death (particularly, as it may relate to "blended families" or "special needs" beneficiaries) -- including the management of your assets for children until whatever age you specify in your Trust (as opposed to the Probate Court giving all of your assets to your children when they reach age 18), and (d) allows someone to manage your Living Trust assets for you should you become incapacitated during life.

Will (Pour-over)

Your Will provides a back-up should you forget to transfer any of your assets to your Living Trust before your death -- unfortunately, in all likelihood, those assets (but only those assets) would have to go through Probate.

If you have minor children, your Will allows you to designate Guardians to take physical custody of your children until they reach age 18 (as opposed to the Probate Court making the decision for you).

Living Will - ("Right-to-Die Declaration") - allows you to express your desires in advance as to the use of life support machines, feeding tubes, or other extraordinary measures should you be in a persistent comatose state or have a terminal condition (thereby preventing the unnecessary wasting of your assets).

Durable Power of Attorney for Health Care Decisions - allows you to designate someone in advance (a) to access all of your medical records, as necessary, (b) to make all decisions for you concerning your health care should you become incapacitated during life, and (c) to make the decision to terminate life support or other extraordinary measures should you be in a persistent comatose state or have a terminal condition.

Durable General Power of Attorney - allows you to designate someone in advance to manage your non-Living Trust assets and make all kinds of decisions for you (other than health care) should you become incapacitated during life (for example, if someone needs to decide whether to put you into a nursing home, file insurance claims for you, sign your tax returns for you, manage your IRA's or other retirement plans for you, etc.).

Deed(s) - Your plan includes the preparation of up to two (2) Quit-Claim Deed(s) that will allow for your home or other real estate wherever located to go directly to the beneficiaries indicated in your Living Trust without having to go through Probate.

Bill of Sale and Revocable Assignment - transfers all of the contents of your home (furniture, furnishings, clothing, jewelry, collectibles, pets, etc.), your digital devices (computers, tablets, smartphones, etc.), and digital assets (email accounts, social networking accounts, on-line banking accounts, on-line media accounts, etc.) to your Living Trust (thereby eliminating the need to take the contents of your home, digital devices and digital assets through Probate) -- however, you can create a list of certain items of these types of property that you may want to go "off the top" to a particular person.

Final Meeting - Your Estate Planning Attorney will meet with you (a) to review your documents, (b) to oversee the proper signing of your documents, and (c) to review with you the procedures that you will need to follow to transfer your assets to your Living Trust and thereby Avoid Probate.

Follow-up Phone Calls - make unlimited phone calls to your Estate Planning Attorney for ninety days at no additional cost.

Plan Allowance - The 50% off Plan Allowance only applies to qualified referrals who (a) are residents of Missouri or Kansas, (b) agree to meet at an approved location in the greater Kansas City, St. Louis or Wichita areas, and (c) implement a comprehensive estate plan as set forth above.

(SEE THE REVERSE SIDE FOR A "SUMMARY OF PLAN COVERAGE, BENEFITS AND FEES")