

# WHAT TO EXPECT DURING THE ESTATE PLANNING PROCESS

*Congratulations! On creating an estate plan. It's an important step in protecting your legacy as well as the people and property that matter most. Our affiliation with AmeriEstate ensures that you will receive the same attention to detail and professionalism you have come to expect from my office. From here, our Estate Experts will work with you personally to address questions and guide you through the process. We are committed to making your experience easy, affordable and highly-personalized. Here's what you can expect:*

## Step 1: Trust Advisor Consultation

- An AmeriEstate Advisor will listen and understand your unique needs, concerns and goals
- Review decisions needed to complete your plan and receive preparation guidance for your attorney consultation
- Upon your decision to move forward, attorney is provided written details of your preliminary decisions

## Step 2: Estate Attorney Consultation

- Your personally assigned Estate Attorney through AmeriEstate speaks directly with you by phone after reviewing consultation details
- Your legal questions are answered and your specific goals are discussed
- Attorney creates final document to meet your individual needs

## Step 3: Trust Preparation, Delivery and Notarization

- Work with a notary public specially trained to handle the delivery and execution of Estate Planning documents
- Notary will visit you in the privacy and comfort of your home, or location of your choice
- Receive assistance from notary on the details of properly titling assets to your Living Trust

*“Professional Estate Planning is more than a Will.  
It is the secure feeling you get knowing that your family is protected and your wishes will be fulfilled.”*

*To ensure an efficient and timely process, you are strongly encouraged to take the following steps in preparation for your initial estate planning consultation with your AmeriEstate Trust Advisor:*

1. Decide who your beneficiaries are and what percentage of your estate you want them to inherit. If you have major assets earmarked for anyone, note that as well.
2. Consider a contingency plan if any of your primary beneficiaries die before receiving their inheritance (e.g. pass their share to their children, their spouse, or to the surviving primary beneficiaries).
3. Who will manage your Trust upon your death or incapacity? Have a few names or an institution in mind.
4. Decide on someone you would entrust to manage your personal affairs and someone to make healthcare decisions for you should you become incapacitated ... Your spouse first, if married, and 2 or more backups.
5. If you have any minor or special needs children, decide who will be their guardian with at least 1 backup.
6. Gather documentation you have for any real estate you own (e.g. grant deed and property tax bill).

*Note: Provisions can be customized for special requirements at no additional cost.*

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