



## What to Expect

So, you sat through a presentation on gift planning and realize there may be a few concepts you weren't previously aware of. Maybe, this is a great opportunity to set up your first official estate plan. Wherever you are in the gift planning process, everyone still has questions.

### What do I need to bring to our first meeting?

We will be taking a "snap-shot" of your estate...as if the **Lord had called you Home** yesterday.

- What are your approximate account values of your retirement plans?
- What is the death benefit of your life insurance?
- What is your home worth?
- Do you have any Investment Accounts? Approximate values?
- Checking and Savings – on average what is your balance? We realize money goes in and out – we are just looking for the average balance.
- Business Ownership?
- Family Cabin? Who owns it and who can own it?
- Any anticipated inheritances?
- Any other Assets?
- Liabilities? Home, credit card, unsecured loans?

We are not looking for exact numbers, just trying to give you an idea of what your estate plan looks like currently and what it could look like.

If you have anything in place right now, we would love to see a copy of your documents. We are not giving you a legal opinion, but rather showing you how your documents will transfer what the Lord has given you to manage.

Many of the questions we ask, you may not have answers for. This may be the first time you and your spouse have really talked about some of these possibilities. After our first visit once we have gathered your information, we will schedule a follow-up meeting. At our follow-up meeting, we will present you with a binder of your information, possibilities and reference material. Think of this as your "workbook".

Once you have had time to process some of our conversations, we may need to get together for a 3<sup>rd</sup> or additional visit. We are here to continue moving you along the planning process as you complete your documents. We will meet with you as many times as you need. We are not here to sell you anything or draft your documents. Because of all the time you spend with us, your attorney bill could be significantly reduced due to the fact that they don't have to educate you from "ground zero". We will also connect with your attorney and/or professional advisors to explain different concepts, how different foundations work and why we were even involved in your planning. That way you don't have to try to explain any technical questions or feel challenged by decisions the advisor may not understand right away.

**Remember: There aren't any dumb questions! You can't do something if you don't even know the opportunity exists!**