

LIVING TRUSTS

HELPING YOUR CLIENT START
PLANNING BEFORE THE NEED ARISES

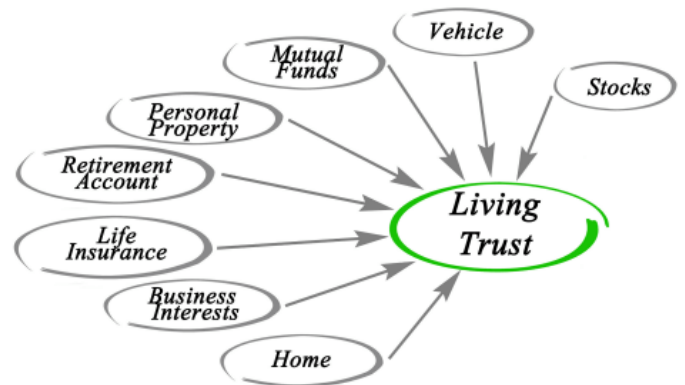
TOP THREE BENEFITS OF A LIVING TRUST

- ✓ A Living Trust Avoids Probate
- ✓ A Living Trust May Save You Money
- ✓ A Living Trust Provides Privacy

Building Wealth is only half the job. Protecting wealth is equally important. Through estate planning, business planning, and asset protection, Burnett & Associates can help give your client's **CLARITY AND PEACE OF MIND**

ALL OUR TRUST BINDERS INCLUDE:

- Revocable Living Trust
- Trust Overview
- Instructions for Settlers, Trustees and Successors
- Durable Powers of Attorney for Property Management
- Durable Powers of Attorney for Health Care
- Pour-Over Wills
- Abstract of Trust
- Personal Information Page
- Blank Forms for Future Trust Administration



PLUS, THESE FUNDING TOOLS:

- Complete Schedule A Listing All Assets
- Deeds & PCORs With Envelopes Addressed to The County Recorder
- Letters & Envelopes Addressed to Each Financial Institution

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