

# Tranont Legal Estate Plan



Death is not something we like to discuss, but it's a serious issue when it comes to those who depend on you. Save your loved ones from enduring lengthy and expensive probate after your death by having an Estate Plan. Because we believe an Estate Plan is so important, as a Tranont Associate you may receive these services and sell these services to retail customers for \$1,495.

## **How to Refer a Customer:**

To order an estate plan for yourself or refer a customer, begin by submitting a service request through the Associate Portal, or at [corporateservicepro.com](http://corporateservicepro.com)

# Features:



- Living Trust Agreement
- Declaration of Trust
- Documents for Funding Your Trust
- Certification of Trust
- Assignment of Personal Property
- Last Will and Testament
- General Power of Attorney
- Advance Health Care Directive
- Living Will
- Final Disposition Instructions

\*As of September 2018

# Talking Points:

- **Living Trust Agreement:** This trust is completely revocable and changeable during your lifetime. It will keep your estate out of probate making sure your assets pass on to your spouse and beneficiaries.
- **Declaration of Trust:** This document confirms that you intended to include all of your property and assets into your trust before your death.
- **Certification of Trust:** This document declares the existence of your trust and gives you right to deal with any account or asset held in the trust.
- **Assignment of Personal Property:** This assignment transfers all of your personal property to your trust.
- **Last Will and Testament:** This document transfers all of your assets into the trust that have not been previously transferred into the trust.
- **General Power of Attorney:** This document gives your named agent the power to deal with any trust and non-trust assets in the event of your incapacity.
- **Advance Health Care Directive, including the Living Will:** This document gives your agent the power to make medical decisions on your behalf and to sign consents and releases with hospitals or doctors.
- **Final Disposition Instructions:** This document allows you to specify how your remains should be handled after your death.
- **Funding Your Trust:** We assist you in transferring your assets into your trust.