

# ESTATE EVALUATION



## WHAT IS ESTATE EVALUATION?

Estate Evaluation is a comprehensive, confidential analysis of your current estate plan by a qualified estate planning expert. The process begins by reviewing your wishes and objectives and results in consideration of appropriate planning alternatives. This process confirms you are leaving what you wish, to whom you wish, in the way that you wish, in the most cost/tax-efficient manner possible. Because of your relationship with our firm, we can offer this service to you at no cost.

### Maximize Wealth Transfer

The process includes identification of tax and other inefficiencies in your estate plan that could reduce the value of what is transferred to heirs at death, and provides efficient planning alternatives intended to maximize the transfer of wealth.

### Confirm Fiduciary Appointments

The Estate Evaluation report provides a summary of all current designated fiduciaries, allowing you to easily confirm the appropriateness of those appointees.

### Frequent Legislative Changes

The failure to update can create complications and unnecessary costs in the administration of your estate. The Estate Evaluation report includes a detailed analysis of your estate planning documents and identifies outdated provisions.

### Changing Objectives

The process considers your current objectives to ensure your wealth transfer plan is designed to leave what you want, to whom you want, in the way you want.



### GATHER INFORMATION

Submission of a completed Information Gathering Kit and a copy of your current estate planning documents, provides the necessary data to initiate the process. You and your advisor will meet with the estate planning expert to provide a comprehensive understanding of your estate planning needs and objectives.



### ANALYSIS

The analysis of your estate plan includes (1) a review of your estate planning documents (2) identification of potential risks, and (3) presentation of more efficient planning alternatives. The results of the analysis are contained within a comprehensive report.



### RESULTS MEETING

The estate planning expert will present the report to you identifying planning alternatives and suggested updates. An action plan clearly identifying the next steps will be presented and, if desired, the expert will coordinate the update of your plan with your other professional advisors.