

## **Process Podcast**

### **Chapter 6 – Asset Alignment**

The next stage in our process is the asset alignment. Just like are the responsibility conversation, you can have the best estate plan in the world, you can have the best documents that have ever been drafted, you can sign the best estate plan that appears right for you and your family, that it might fail, if you don't align your assets with the plan.

Now, many attorneys don't have this step. For example, once they have you sign your legal documents, they'll hand you a sheet of paper and say now here's how you go and make sure that the assets are transferred into the trust or here's how you go and make sure that the beneficiary designations are all correct.

In contrast, our program helps you with this. We have two different modes, we have a done for you where we do all of the paperwork for you, or done with you where we provide you instruction but then check to make sure that everything has been done correctly. You have the documents sent to our office, and you have your new statements sent to us and we check them to make sure that everything has been done according to plan and that it fits hand in glove with the plan that we've prepared for you.