

Process Podcast

Chapter 3 – Design

The third step in the family estate legacy program is the design step. Here we're going to design your plan and the level of planning that you desire based upon your organizer, as well as what we found out in the goals and responsibility conversation. We have different levels of planning that of course will have different fee structures and we'll discuss this all with you during the design phase.

The design phase will also go into many details, such as, do you want to give your children ultimate authority over their inheritance? Do you want to restrict it in some way? You want to protect it from a divorcing spouse or from creditors, and on and on. So the design is going to be a very critical stage of your estate planning process.