

Process Podcast

Chapter 5 – Advisor Coordinator

The next phase of the family state legacy program is the advisor coordinator. We can implement this phase at any stage in the process. If you have a trusted loved one, a trusted attorney, a trusted CPA or financial advisor that you'd like to make part of our process, we invite you to do so.

If they're not in our area, then we can of course conference them in we can either phone conference man or we can video conference them in. Everything that we do is transparent, and we're happy to include anyone in this process that you want that would help you get comfortable with creating your revised, updated or your brand-new estate plan.