

# Services Included in Your Plan...

- Free consultations to review estate plan
- Newsletters and e-newsletters about developments and changes in the law
- Free consultations upon a death or incapacity
- Free reviews of your estate plan
- Free consultations with Successor Trustee
- Free notification of changes in the law
- Free estate planning calls
- Free family orientation meetings
- Free notary service
- Regular follow-up letters
- Flat fees quoted for all services offered
- Personal assistance regarding funding of trust
- Assistance with transfer of out-of-state real property
- Transfer of Arizona real property
- Client Continuing Education seminars
- Public and private seminars
- Firm website [www.morristrust.com](http://www.morristrust.com)
- Available contact with multiple attorneys and paralegals
- Benefits due to our membership in American Academy of Estate Planning Attorneys
- Staff email addresses
- Eleven convenient office locations throughout the Southwest available to you
- Initial DocuBank membership
- Portfolio binder
  - Revocable Living Trust
  - Certificate of Trust
  - Affidavit of Trust
  - Community Property Agreement for married clients
  - Assignment and Nominee Agreement
  - Property Power of Attorney
  - Last Will (Pour Over Will)
  - Health Care Power of Attorney
  - Authorization to Disclose Protected Health Information- HIPAA
  - Living Will
  - Memorandum for distribution personal effects and heirlooms
  - Funding instructions, letters and assignments
  - Form for explanation of burial and funeral wishes
  - Checklist regarding assets
  - Diagram chart on how the estate plan flows
  - Location List form for inventory of important papers
  - Client Key Advisors List
  - List of friends and relatives to be contacted
  - Summary of portfolio on compact disc
  - Instructions for Successor Trustee/Personal Representative
  - Checklist outlining trust funding status

# Additional Services Available...

- Estate Administration:
  - Trust Administration and Probate
  - Conservatorships and Guardianships
- Advanced Estate Planning:
  - Irrevocable Life Insurance Trusts
  - Business Succession Planning
  - Family Limited Liability Limited Partnerships
  - Limited Liability Companies
  - Corporations
  - Charitable Remainder Trusts
  - Family Foundations
  - Qualified Personal Residence Trusts
  - Prenuptial and Postnuptial Agreements
- Financial Planning:
  - Preliminary financial and estate plan coordination
  - Qualified financial advisors available to you
  - 529 Plans
  - Review of annuities, life insurance and long term care policies
  - Review of strategies for retirement planning
  - Repositioning of assets for maximum benefit/minimum tax
  - Repositioning of assets to guarantee income stream
  - Review of estate and asset analysis
  - Asset Management
  - Management of IRA, ROTH IRA and rollovers
  - Aggressive in getting best price term insurance and designing other types of insurance programs
- Mortgage Planning:
  - Free initial consultation and analysis of current situation
  - First or second mortgages or equity lines
  - Refinancing
- Real Estate Planning:
  - Free initial consultation
  - Buying or selling of property
  - Stronger buying power through relationship with Realty Executives
- Elder Care Planning:
  - Medicaid/ALTCS (Arizona Long Term Care Systems) planning
  - Care coordination provided by social workers, registered nurses and geriatric care managers
  - Special needs planning
  - Placement assistance and assistance with community resources
  - Client and family advocacy for continuity of care
  - Social services
- Accounting Services:
  - Preparation of 706, 709, 1041 and 1065 tax returns
- Maintenance Plan
  - Annual amendment or restatement of your trust
  - Healthcare documents for your immediate family (over 18 years of age)
  - Annual summary of your trust and asset information
  - One in-state deed