



ESTATE PLANNING OPTIONS

MARRIED COUPLES

THE ESSENTIALS WILL PLAN

This estate plan offers basic legal protections at the lowest initial planning cost. The General Power of Attorney and Health Care Directives give lifetime authority for someone to handle your financial and medical decisions if you are not capable of doing so. The Last Will directs everything to go to your surviving spouse and then outright to your children equally. This plan is as simple as it gets, yet provides essential legal protection for you and your family.

THE CUSTOM WILL PLAN

This estate plan offers basic legal protections at a low initial planning cost. The General Power of Attorney and health care directives give lifetime authority for someone to handle your financial and medical decisions if you are not capable of doing so. The Last Will directs everything to go to your surviving spouse and then outright to your family, friends or charities in the manner you desire. This plan is as simple or as complex as you want, and provides essential legal protection for you and your family.

THE CHILDREN'S PROTECTION PLAN

This estate plan allows parents with young children to achieve the basic protections they desire for themselves and their children at a modest initial planning cost. The Last Will passes everything to the surviving parent. When both parents pass away, everything flows into a Trust for the benefit of the children.

THE FUNDAMENTAL TRUST PLAN

This estate plan is for married parents of adult children who want to enjoy the benefits of a straightforward, high quality trust at a modest initial planning cost. The trust operates immediately, and eliminates probate proceedings for incompetence or death if the trust holds title to all of your assets. When both parents pass away, each child receives an equal share of the remaining trust assets and the trust terminates.

THE CUSTOM TRUST PLAN

This estate plan is for married couples who want to enjoy the maximum flexibility, benefits and protections that a Revocable Living Trust can offer. The trust operates immediately, and eliminates probate proceedings for incompetence or death if the trust holds title to all of your assets. It also minimizes federal and Ohio estate taxes. You retain full control and exclusive benefit throughout both spouses' lifetimes. After the second spouse passes away, a successor Trustee that you appoint manages and distributes the remaining trust assets in any way that you direct. This plan gives you unlimited possibilities to custom tailor the trust terms to meet your unique family circumstances or goals.

For more information on these and other estate planning options,
please visit our **Learning Center**





ESTATE PLANNING OPTIONS

SINGLE PERSONS

THE ESSENTIALS WILL PLAN

This estate plan offers basic legal protections at the lowest initial planning cost. The General Power of Attorney and Health Care Directives give lifetime authority for someone to handle your financial and medical decisions if you are not capable of doing so. The Last Will directs everything to go outright to your children equally on your death. This plan is as simple as it gets, yet provides essential legal protection for you and your family.

THE CUSTOM WILL PLAN

This estate plan offers basic legal protections at a low initial planning cost. The General Power of Attorney and Health Care Directives give lifetime authority for someone to handle your financial and medical decisions if you are not capable of doing so. The Last Will directs everything to go outright to your family, friends or charities in the manner you desire on your death. This plan is as simple or as complex as you want, but provides essential legal protection for you and your family.

THE CHILDREN'S PROTECTION PLAN

This estate plan allows a single parent with young children to achieve the basic protections they desire for themselves and their children at a modest initial planning cost. When the parent passes away, the Last Will passes everything into a Trust for the benefit of the children.

THE FUNDAMENTAL TRUST PLAN

This estate plan is for single parents of adult children who want to enjoy the benefits of a straightforward, high quality trust at a modest initial planning cost. The trust operates immediately, and eliminates probate proceedings for incompetence or death if the trust holds title to all of your assets. When you pass away, each child receives an equal share of the remaining trust assets and the trust terminates.

THE CUSTOM TRUST PLAN

This estate plan is for a single person who wants to enjoy the maximum flexibility, benefits and protections that a Revocable Living Trust can offer. The trust operates immediately, and eliminates probate proceedings for incompetence or death if the trust holds title to all of your assets. You retain full control and exclusive benefit throughout your lifetime. After you pass away, a successor Trustee that you appoint manages and distributes the remaining trust assets in any way that you direct. This plan gives you unlimited possibilities to custom tailor the trust terms to meet your unique family circumstances or goals.

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