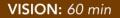


Client Roadmap

Your Simple Path to Estate Planning Success



Free consultation to identify & explain goals, understand options.

DESIGN: 60 min

Deep dive with attorney to craft your unique plan.

SIGNING: 15 min

03

Final signing with attorney, witnesses, notary depending.

Yes, it's that simple.

Annual legal reviews* are advisable as assets, goals, and laws change.

*Free for Legacy Track Members



START YOUR JOURNEY TODAY!

No more putting it off. Scan the QR code and schedule your free consultation now.