trust&will

Who's a good fit for Trust & Will's estate planning solutions?

While Trust & Will can make estate planning easier and more accessible for some of your clients, we're not the right solution for everyone. We've built this checklist as a reference to help you gain a better understanding of the type of clients using Trust & Will.

Clients may be a good fit for Trust & Will if all of these conditions are met:

- Is domiciled anywhere in the United States
- Desires an estate plan that is dynamic and can change as their life changes
- Non-taxable estates
- Has a need for Will, Power of Attorney, HIPAA Authorization, Healthcare Directive, and Revocable Living Trust if necessary
- Has a straightforward family structure and wishes to create a plan in partnership with a spouse (if applicable)
- Is happy to use outright or aged-based distributions of the grantor's choosing for beneficiaries (ie. ⅓ at age 18, ⅓ at 25, ⅓ at 35)
- Wishes to have expert support throughout the process to help them create a plan that suits their needs

Clients are NOT the right fit for Trust & Will if any of these conditions are met:

- Taxable estates (over federal estate or state estate tax threshold)
- Need a Trust that is not a revocable living trust or a testamentary trust (ie: special needs trust, generation-skipping trust, irrevocable life insurance trust, etc.)
- Have a blended family structure and want to make complex distributions to their children
- Need event-based distributions (ie. My daughter can receive these assets only if she graduates from a select list of universities.)
- Own properties in three or more states outside of an LLC
- Want to name a corporate trustee and that corporate trustee requires specific language in the trust in order to serve in that role

When assessing clients who are a fit for Trust & Will's estate planning services, these established life milestones and pivotal events help encourage discussions about estate planning.

MILESTONES

- Getting Married
- Buying a house
- Having Children
- Rise in income
- Rise in net worth
- Opening a savings account
- Getting a car
- Getting a pet

PIVOTAL EVENTS

- Health Scare
- Travel
- Death in F&F
- Divorce
- Moving states
- You opt-in for organ donation

Additional questions? Please contact us at advisors@trustandwill.com