ESTATE PLANNING

SOLUTIONS SUITE

Estate Planning Specialists, LLC
Estate Planning Made Easy

DURFEE LAW GROUP PLLC
INTEGRATED PLANNING

$697.50

ESTATE PLANNING SOLUTIONS SUITE

Now What Should You Do?

With a new administration in place and potential shifts in estate and tax laws on the horizon, 2025 is the year to act decisively. Don't wait—seize this moment to secure your financial future. Regret comes from knowing you could have acted but didn't. We've seen this opportunity before, and history shows that proactive Americans win by acting now. Hesitation could cost you.

Estate planning isn't just about who gets what when you're gone—it's about controlling when and how your legacy is passed on. Plus, it's time to lock in your retirement strategy. The window for action is wide open, but it won't stay that way. Partnering with top experts, Estate Planning Specialists has streamlined retirement and estate planning with **The Estate Planning Solutions Suite**. Your first step starts here—don't wait.

What's Included:

Personal Summary & Recommendations

- A comprehensive breakdown of your current estate plan.
- Recommendations of viable strategies specifically applicable to you. Providing you a road map to reach your goals and objectives.

Do you need a will or a trust?

A cost analysis comparison of having a Will vs Trust.

Your Personal Estate Tax Calculations

Tax calculations to illustrate your current and projected potential tax liabilities for you and your family.

Personal Estate Liquidity Recommendations

- Wealth Creation Strategy
- Family Bank Strategy

Strategies to make certain you keep your wealth in the family

Long Term Care Solutions

How to ensure that a Long Term Care event won't deplete your estate.

Creative and Estate Tax Ideas

Strategies that you may choose to implement that will help you achieve your estate planning goals.

Legal Audit of Your Estate Plan

A legal review of your estate planning documents by The Durfee Law Group, as well as a follow-up conference.

Books & Reports

- *The 10 Most Common Estate Planning Mistakes* book by David Phillips
- *Disinherit the IRS Special Report* by David Phillips
- *The Bombshell Battle Plan: Post 2020 Election Special Report* by David Phillips
- *The Family Bank Strategy* book by David Phillips
- *The Leveraged Care Solutions Special Report* by David & Todd Phillips
- *If I had a Million Dollars* Special Report by Todd Phillips
- *The Future of Retirement Savings* book by Todd Phillips

☐ **Yes,** I want to take charge of my future today and plan for my retirement. Please rush the initial components of my ***Estate Planning Solutions Suite*** for just $697.50.

Payment Information

Charge my: ☐ VISA ☐ MasterCard ☐ American Express ☐ Discover

Card Number: ______ ______ ______ ______ Exp. Date: ______

Signature: ______

*Signature is required for credit card orders

For Assistance Call 1-888-892-1102

CONFIDENTIAL
PERSONAL ESTATE PLANNING PROFILE

Fax 1-480-899-6723

IF YOU ARE SINGLE, WIDOWED OR DIVORCED, SIMPLY PROVIDE YOUR PERSONAL INFORMATION AND DISREGARD ALL REFERENCES TO A SPOUSE

FULL NAME

DATE OF BIRTH | SMOKER? ☐ YES ☐ NO | CITIZENSHIP | OCCUPATION

WITHIN THE PAST FIVE YEARS HAVE YOU CONSULTED A PHYSICIAN, MEDICAL PRACTITIONER OR BEEN CONFINED TO A HOSPITAL, CLINIC OR MEDICAL FACILITY?

☐ YES ☐ NO IF YES, PLEASE GIVE DETAILS:

SPOUSE'S FULL NAME

DATE OF BIRTH | SMOKER? ☐ YES ☐ NO | CITIZENSHIP | OCCUPATION

WITHIN THE PAST FIVE YEARS HAVE YOU CONSULTED A PHYSICIAN, MEDICAL PRACTITIONER OR BEEN CONFINED TO A HOSPITAL, CLINIC OR MEDICAL FACILITY?

☐ YES ☐ NO IF YES, PLEASE GIVE DETAILS:

HOME ADDRESS | CITY, STATE, ZIP | HOME PHONE | BEST TIME TO CALL

EMAIL | DO YOU CURRENTLY HAVE LONG-TERM CARE INSURANCE? ☐ YES ☐ NO

ASSETS & LIABILITIES

Key: Use to indicate how title is held:
H=Husband's separate W=Wife's separate CP=Community property JT=Joint tenancy TC=Tenancy in common TE=Tenancy by the entirety

DESCRIPTION OF ASSETS	FAIR MARKET VALUE	LIABILITY	NET VALUE	HOW TITLE IS HELD
RESIDENCE				
OTHER REAL ESTATE				
STOCKS & BONDS				
BUSINESS INTERESTS				
CASH IN BANKS (CD'S, MONEY MARKETS, ETC)				
TAXABLE RETIREMENT: IRA, 401(K), 403(B) PLANS				
TAX FREE RETIREMENT: ROTH IRA				
PERSONAL EFFECTS (AUTOS, BOATS, ETC.)				
VALUE OF ALL ANNUITIES				
OTHER ASSETS				
OTHER DEBTS				
TOTAL VALUES	**$ 0.00**	**$ 0.00**	**$ 0.00**	

LIFE INSURANCE

(Please list additional policies on separate paper)

COMPANY	INSURED	OWNER	BENEFICIARY	POLICY DATE	FACE AMOUNT	CASH VALUE

CHARITABLE GIFT

Total value of assets that you will bequeath, based on current designation, to charities at your death. You? $ Spouse? $

INCOME

Joint annual gross earned income $ Joint annual gross income from investments $

CHILDREN

(List ALL living children: S=Self SP=Spouse J=Joint)

NAME	AGE	SEX	PARENT	NAME	AGE	SEX	PARENT
		☐ M ☐ F	☐ S ☐ SP ☐ J			☐ M ☐ F	☐ S ☐ SP ☐ J
		☐ M ☐ F	☐ S ☐ SP ☐ J			☐ M ☐ F	☐ S ☐ SP ☐ J

GRANDCHILDREN

(If you are planning to leave an inheritance to any of your grandchildren, please indicate below: S=Self SP=Spouse J=Joint

NAME	AGE	SEX	GRANDPARENT	NAME	AGE	SEX	GRANDPARENT
		☐ M ☐ F	☐ S ☐ SP ☐ J			☐ M ☐ F	☐ S ☐ SP ☐ J
		☐ M ☐ F	☐ S ☐ SP ☐ J			☐ M ☐ F	☐ S ☐ SP ☐ J

Please indicate the estate planning tools you currently have in place:

- ☐ UPDATED WILL
- ☐ CREDIT SHELTER OR BYPASS TRUST
- ☐ REVOCABLE LIVING TRUST
- ☐ MEDICAL POWER OF ATTORNEY
- ☐ DURABLE POWER OF ATTORNEY
- ☐ FAMILY DYNASTY TRUST
- ☐ FAMILY LIMITED PARTNERSHIP
- ☐ FAMILY OR COMMUNITY FOUNDATION
- ☐ CHARITABLE TRUST
- ☐ IRREVOCABLE LIFE INSURANCE TRUST
- ☐ ESTATE LIQUIDITY THROUGH LIFE INSURANCE
- ☐ LIMITED LIABILITY COMPANY
- ☐ QUALIFIED PERSONAL RESIDENCE TRUST
- ☐ COMMON LAW TRUST
- ☐ GRANTOR RETAINED INCOME OR ANNUITY TRUST
- ☐ OFFSHORE ASSET PROTECTION
- ☐ OTHER (EXPLAIN) ____________

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