PROTECT YOUR FAMILY. SECURE YOUR FUTURE. REST ASSURED.

# A PROVEN PATH TO ESTATE PLANNING

## 8 STEP STARTING POINT

### 1 THE ESTATE PLAN ON-RAMP

During our initial call, we discuss your estate planning goals. We then email you six *Estate Planning Briefs* to review, so you know the key decisions you have to make. We will also send you a *Financial Planning Questionnaire* to easily organize your personal and financial information.

### 2 THE GOAL CLARIFYING MEETING

We conduct an in-depth consultation to clarify your family, financial, and emotional goals. Key decisions regarding your personal care and your children's care, upon your disability and death, are made. We also discuss to whom, and when, your assets will be distributed after you pass away. Together, we create a unique plan tailored for your family.

### 3 THE PLAN DESIGN

We review and analyze the notes and conversation from our meeting to finalize the plan and follow up to finalize any open matters. Custom documents are prepared to meet your life, family and financial goals.

### 4 THE CLIENT'S CLEAR VIEW

At the signing conference, we clearly explain key elements of each document and how each document operates. We discuss Trust funding, and beneficiary designations on life insurance policies and retirement accounts; and include easy to use tools to help with this. You will get a binder of your documents and we will securly store an online version.

### 5 THE CPA & FINANCIAL ADVISOR COORDINATION

We send a letter to your CPA and financial advisor with an electronic set of your documents, so they know you have a completed estate plan. If needed, we will also help them title assets into your Trust.

### 6 THE ENGAGEMENT REVIEW

We review the entire process and request any feedback (positive and negative) on your experience. We also ask you fill out an anonymous on-line survey.

### 7 THE FUNDING FOLLOW-UP

At the six month anniversary of your plan signing, we'll remind you again to fund your Trust.

### 8 THE ANNUAL CHECK-UP

We will contact you every January reminding you to review your estate plan to make sure it still reflects your goals, and to make sure your trust funding is up-to-date. You will also receive a periodic e-newsletter throughout the year with updates on various legal and business issues.

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# RESULTS-BASED ESTATE PLANS

Your estate plan needs to be as unique as you are. With proper planning, you can make sure your specific wishes are fulfilled during lifetime disability and after your death, with minimal interference from courts and third parties, minimal costs and expenses (including potential estate taxes), and minimal delays. Importantly, we eliminate the need for probate and make sure only your designated heirs receive your estate. Many people believe estate planning is only for the rich. Nothing could be further from the truth. Do you want your children to inherit your assets when they turn 18? Have you appointed someone to care for your children if you prematurely pass away or become incapacitated? Do you want the courts interfering in your personal and family affairs? Your estate plan is an important part of your personal legacy and ensures your concerns are carefully addressed.

With decades of experience, the Law Office of Andrew J. Goldberg can also assist you in numerous other legal matters to help you reduce your taxes, protect your business and secure your future, including the following:

### CORPORATE, LLC AND TAX

- Formation And Dissolution of Corporations and LLCs
- Corporate Bylaws, Shareholder Agreements and Voting Rights Agreements
- Stock and Membership Interest Restriction Agreements
- LLC Operating Agreements
- Buy-Sell Agreements
- Business Succession Planning
- Tax Planning and Strategies for Business Structures
- IRS Audits, Collection and Tax Controversies

### BUSINESS TRANSACTIONS AND OPERATIONS

- Purchases and Sales Of Businesses
- Mergers and Acquisitions
- Bank Financing / SBA Loans
- Human Resource Matters
- Employee Benefits
- Employment and Independent Contractor Agreements
- Confidentiality, Noncompetition and Nonsolicitation Agreements
- Deferred Compensation
- Asset Protection Planning
- Intellectual Property
- Real Estate Acquisitions and Leases

### ESTATE/LEGACY PLANNING

- Revocable Living Trusts and Wills
- Medical Powers of Attorney and Living Wills
- Durable Powers of Attorney
- Life Insurance Trusts
- Generations-Skipping Trusts
- Family Limited Liability Companies
- Charitable Remainder Trusts
- Grantor Retained Annuity Trusts
- Gifting Programs
- Probate Administration and Estate & Trust Administration
- IRA Distribution Strategies

# THE ESTATE PLANNING EXPERT

Andrew J. Goldberg, is founder of The Law Office of Andrew J. Goldberg and creator of the ***A Proven Path to Estate Planning*** process. For over two decades, he has successfully counseled businesses and families on how to achieve their personal and professional goals and manage their risks. Mr. Goldberg regularly counsels clients in a broad range of business, taxation and estate planning matters, including: the accumulation and preservation of wealth, estate and business succession planning, business formations and corporate transactions, tax planning, and general contract matters. As a Certified Public Accountant, he is often involved in matters where legal, accounting and business issues intersect.

Mr. Goldberg has written numerous articles for national and local periodicals and has also been a frequent guest on radio and television discussing business and estate planning issues. Most recently he was a contributing author to the legal treatise, ***Advising Closely-Held Businesses in Michigan***. Mr. Goldberg also conducts numerous seminars for various professional organizations, and businesses.

Mr. Goldberg earned a B.S. in Accounting from Indiana University, and a J.D. from the University of Michigan. He is a member of the State Bar of Michigan Business Law and Tax Law Sections, and a member of the Michigan Association of Certified Public Accountants and American Institute of Certified Public Accountants.

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