



# What is Estate PLANNING

**A** N ESTATE PLAN  
GUIDES FAMILIES DURING  
THEIR LIFE AND INTO  
THEIR LEGACIES.



## Protecting Promises

Serving the Families of Epstein & White, whom we coach and partner with through our Southern California Institute.



TRADITIONAL TRUST	CONTROL TRUST	CUSTODIAL TRUST WITH ASSET PROTECTION
<ul style="list-style-type: none"> <li>• Counseling</li> <li>• Wills</li> <li>• Guardian Nomination for Minors</li> <li>• Nomination of Conservator</li> <li>• Financial Power of Attorney</li> <li>• Health Care Directives</li> <li>• HIPAA Documentation</li> <li>• Real Property Deed(s)</li> <li>• Community / Separate Property Agreement</li> <li>• Revocable Living Trust:               <ul style="list-style-type: none"> <li>- Surviving Spouse Control</li> <li>- Incapacity Planning - Trustee Succession and Powers for Benefits Qualification</li> <li>- Probate Avoidance</li> <li>- Simple and/or Stagger Distribution to Family and Others</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Counseling</li> <li>• Wills</li> <li>• Guardian Nomination for Minors</li> <li>• Nomination of Conservator</li> <li>• Financial Power of Attorney</li> <li>• Health Care Directives</li> <li>• HIPAA Documentation</li> <li>• Real Property Deed(s)</li> <li>• Community / Separate Property Agreement</li> <li>• Revocable Living Trust:               <ul style="list-style-type: none"> <li>- Surviving Spouse Control</li> <li>- Incapacity Planning - Trustee Succession and Powers for Benefits Qualification</li> <li>- Surviving Spouse Creditor Protection</li> <li>- Control, Flexibility, and/or Limitations</li> <li>- Probate Avoidance</li> <li>- Simple and/or Stagger Distribution to Family and Others</li> <li>- Estate Tax "Coupon Protection"</li> <li>- Lifetime Assets and Divorce Protection for Family and Others</li> <li>- Education Planning for Children and Grandchildren</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Counseling</li> <li>• Wills</li> <li>• Guardian Nomination for Minors</li> <li>• Nomination of Conservator</li> <li>• Financial Power of Attorney</li> <li>• Health Care Directives</li> <li>• HIPAA Documentation</li> <li>• Real Property Deed(s)</li> <li>• Community / Separate Property Agreement</li> <li>• Revocable Living Trust:               <ul style="list-style-type: none"> <li>- Surviving Spouse Control</li> <li>- Incapacity Planning - Trustee Succession and Powers for Benefits Qualification</li> <li>- Surviving Spouse Creditor Protection</li> <li>- Control, Flexibility, and/or Limitations</li> <li>- Probate Avoidance</li> <li>- Simple and/or Stagger Distribution to Family and Others</li> <li>- Estate Tax "Coupon Protection"</li> <li>- Lifetime Assets and Divorce Protection for Family and Others</li> <li>- Education Planning for Children and Grandchildren</li> <li>- Disability Planning for Possible Long Term Care</li> <li>- Trustee and Agent Powers and Instructions for Disability Qualification and Gifting</li> <li>- Trustee and Agent Self-Dealing Instructions, Powers and Limitations</li> </ul> </li> </ul>
FEE LEVEL: \$ 1,200	FEE LEVEL: \$ 1,700	FEE LEVEL: \$ 2,200



Protecting Families and Their Assets

Phone: 858-200-1900 • Fax: 858-200-1920  
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# What is Beneficiary Asset Protection P L A N N I N G

**BENEFICIARY PROTECTED  
TRUST**

**RETIREMENT BENEFICIARY  
DESIGNATION TRUST**

**SPECIAL NEEDS TRUST**



## PROPER ESTATE PLANNING ALLOWS YOU TO PLAN FOR:

- Yourself and your loved ones without giving up control;
- Your current and future concerns for your family members;
- The possibility of your own disability and the 4<sup>th</sup> Quarter of your life;
- What you own to go to whom, when, and the way you want;
- Fully disclosed and controlled costs; and
- Your dreams and goals for yourself, your family, and your assets.

## OUR CLIENTS' DREAMS AND GOALS VARY, BUT OFTEN INCLUDE:

- Protecting your assets for yourself and your family;
- Planning for Long Term and Custodial Care;
- Reducing income, gift, estate, and generation skipping taxes;
- Keeping your affairs free from publicity, costs, and the delay of the probate court; and
- Updating your plan due to changes in the world, taxes, finances and your family.

We collaborate with other attorneys, financial planners, bankers, accountants, stockbrokers, insurance professionals, and healthcare professionals in order to serve your specialized planning needs.



### BENEFICIARY PROTECTED TRUST

Create an asset protection trust for your family members to last their lifetime and guard your hard-earned assets from their potential creditors or a possible divorce.

\$2,800 (Stand Alone Trust)  
\$1,400 (with RLT Planning)

### RETIREMENT BENEFICIARY DESIGNATION TRUST

Make sure your retirement plans such as IRAs, 401ks, and similar plans will grow, be protected, and provide a long term retirement for those you love.

\$3,600 (Stand Alone Trust)  
\$1,800 (with RLT Planning)

### SPECIAL NEEDS TRUST

Protect and provide for your most vulnerable family members throughout their life without disturbing access to benefit programs.

\$4,200 (Stand Alone Trust)  
\$2,100 (with RLT Planning)



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