

# SMITH STRONG, PLC Vision Clarifier

**Client:** \_\_\_\_\_ **OUR VISION FOR YOU** **Date:** \_\_\_\_\_

**OPTION A** \_\_\_\_\_ (BASE WILL PLAN)

WILL (FOUNDATION) includes two sub-trusts for disabled or minor beneficiaries

HEALTH CARE PROXY  
(EXPANDED & HIPAA COMPIANT)

POWER OF ATTORNEY  
(EXPANSIVE & WITH INSTRUCTIONS)

**PROVIDES SOLUTIONS TO ISSUES:**

\_\_\_\_\_ Thru \_\_\_\_\_ on Estate Plan Audit

**OPTION A-1** \_\_\_\_\_ (PERSONALIZED WILL PLAN)

WILL (ENHANCED) - Includes two sub-trusts for disabled or minor beneficiaries and lifetime asset protection to spouse and/or kids. Some remarriage protection.

HEALTH CARE PROXY  
(EXPANDED & HIPAA COMPLIANT)

POWER OF ATTORNEY  
(EXPANSIVE & WITH INSTRUCTIONS)

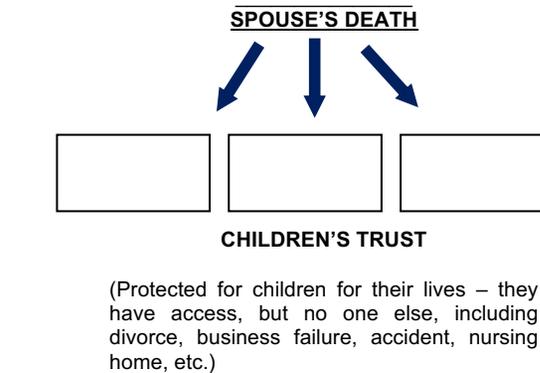
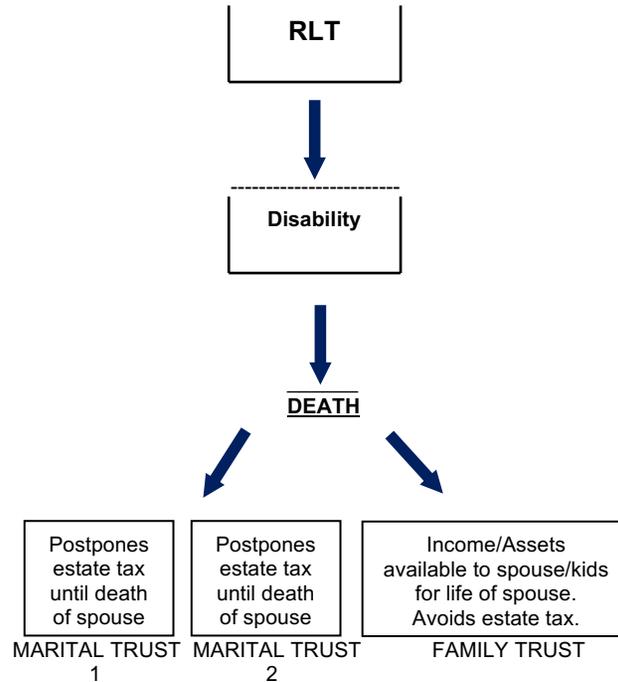
LIVING WILL  
(PERSONAL, DETAILED WISHES FOR CARE)

**ENHANCED TO PROVIDE SOLUTIONS TO COUNSELING ISSUES:**

\_\_\_\_\_ Thru \_\_\_\_\_ on Estate Plan Audit

**OPTION B** \_\_\_\_\_ (TRUST PLAN) \_\_\_\_\_ maintenance

Includes Option A and custom-tailored revocable trust (book of instruction - your rule book).



**PROVIDES SOLUTIONS TO ISSUES:**

\_\_\_\_\_ Thru \_\_\_\_\_ on Estate Plan Audit

**OPTION C** \_\_\_\_\_ (ASSET PROTECTION) \_\_\_\_\_ maintenance

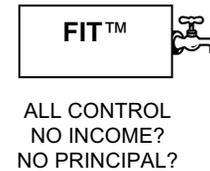
Includes Option B and one custom-tailored irrevocable asset protection trust.

**PROVIDES SOLUTIONS TO ISSUES:**

\_\_\_\_\_ Thru \_\_\_\_\_ on Estate Plan Audit



**OR**



(LINE OF CONTROL)

**OPTION D** \_\_\_\_\_ (ADVANCED/TAX PLAN) \_\_\_\_\_ maintenance

Includes Option B and the following:

- Kid's Irrevocable KIT Trust
- Life Insurance Trust (ILIT)
- Charitable Trust (CRAT/CRUT)
- Personal Residence Trust (QPRT)
- Grantor Retained Trusts (GRAT/GRUT)
- Family Limited Partnership (FLP)
- Private Foundations
- Business Succession Trusts

**PROVIDES SOLUTIONS TO ISSUES:**

\_\_\_\_\_ Thru \_\_\_\_\_ on Estate Plan Audit