

What You Should Ask When Choosing Your Estate Planner

If you shop and compare estate planners, consider the following:

- | | <u>Mark Clair</u> | <u>Other</u> |
|--|-------------------------------------|--------------|
| 1. Is their practice limited to estate planning and wealth preservation?
(At the Estate Planning Law Firm of Mark D. Clair, estate planning, wealth preservation and estate administration is all that we do.) | <input checked="" type="checkbox"/> | |
| 2. Do they take a “comprehensive approach,” and consider how three critical areas (Financial, Asset Protection and Estate) overlap?
(At the Estate Planning Law Firm of Mark D. Clair we analyze how the growth of your investments/savings, taxes, the high cost of long term care and estate issues all may have an affect on the outcome of your planning.) | <input checked="" type="checkbox"/> | |
| 3. How long has the law firm been in business and how many years of experience does it have in estate planning?
(Mark Clair has been in business for over 10 years, all of which have been devoted exclusively to estate planning and wealth preservation.) | <input checked="" type="checkbox"/> | |
| 4. Do they include in their planning, strategies to protect your life savings from being lost in a divorce settlement, lawsuit or taxes by the IRS (or going to that undesirable In-Law)?
(Protection for these situations are standard equipment in our living trusts.) | <input checked="" type="checkbox"/> | |
| 5. Do they provide you with a comprehensive “Owner’s Manual,” along with your Living Trust and associated documents?
(At The Estate Planning Law Firm of Mark D. Clair we provide an Owner’s Manual that includes a Checklist of Actions to be taken immediately if something happens to you, a Property Organizer to list your assets and where you keep important documents and other valuable tools and directions that will be needed in the case of your incapacity or death.) | <input checked="" type="checkbox"/> | |

(Please Turn to Other Side.)

Mark Clair

Other

Do they assist in transferring *all* your assets properly into your Living Trust?



(We do at the Estate Planning Law Firm of Mark Clair, with our special letters and "ID card." That's how you'll be assured of avoiding costly and lengthy conservatorship and probate proceedings.)

Do you receive a free review meeting *every three years*?



(At the Estate Planning Law Firm of Mark Clair, we have the commitment and history of following up with our clients regularly to be sure that their plans will be up to date with the law and their wishes when the time comes.)

Do they provide your spouse or other successor trustee a free consultation when you pass away?



(At the Estate Planning Law Firm of Mark Clair, this is already included as part of your initial planning fee, and we encourage your trustee to seek proper legal assistance in carrying out of the terms of your plan exactly as you intended.)

Remember, your estate planner is responsible for protecting your entire lifetime's hard earned assets, so choose your estate planner wisely!

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Note: The statements made here are the opinions of the Estate Planning Law Firm of Mark Clair and there are no legal or regulatory requirements that your estate planner meet all these tests in order to properly prepare a living trust or other estate plan for you