

# OUR PLANNING LEVELS

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Level 1 **Will Plan**



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Level 2 **Estate Plan**



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Level 3 **Wealth Plan**



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Level 4 **Legacy Plan**



ZIMMERMAN & ASSOCIATES

Estate Planning | Business Planning | Elder Law Attorneys

2400 E. Commercial Blvd.,  
Suite 820

Fort Lauderdale, FL 33308

Tel 954.202.7440

Fax 954.678.3088

[www.zimmermanlaw.com](http://www.zimmermanlaw.com)

# FOUR LEVELS OF PLANNING

## LEVEL ONE



For the family who wants to take care of their basic estate planning needs and is not concerned with avoiding the court process called probate.

## LEVEL TWO



For the family who wants the total assurance and peace of mind of knowing their wealth will be transferred to heirs with the most ease and convenience possible in the privacy of our office without court involvement. Clients choosing the Estate Plan may also opt to protect their beneficiary's inheritance from lawsuits, spouses and estate taxes.

## LEVEL THREE



For the family who wants the total assurance and peace of mind of the Estate Plan and also all the comfort of knowing that asset transfers are taken care of by our office. This plan is appropriate for busy families who want the least amount of personal effort and the greatest amount of convenience and care. We do it all for you.

## LEVEL FOUR



For the family who needs more than just the foundational planning of the first three levels. Clients choosing the Legacy Plan may have advanced planning needs involving complicated estate tax or asset protection issues.

### FUNDAMENTAL PLANNING

### ADVANCED PLANNING

#### Your Will Plan...

Includes a will naming those that will receive your assets through the court administered probate process and provides the peace of mind of knowing we are here to help you navigate the system during your life and to help your family after you are gone.

The Will Plan includes Health Care Directives and Powers of Attorney so that you know that you are well taken care of if anything happens. And, if you have a child (or children) it also includes a Child Protection Plan to ensure they are always raised by the people you want, in the way you want and that they are never taken out of your home by the authorities.

Single \$ 1,000 - 2,000  
Married \$ 1,500 - 3,500

#### Your Estate Plan...

Provides everything included in the Level One plan, plus a Revocable Living Trust. Your family can avoid the expense, delay and public proceeding of probate when transferring your assets to your beneficiaries. Should you become incapacitated, your affairs can be privately managed by people you choose.

Single \$ 2,500 - 3,500  
Married \$ 3,000 - 5,000

#### Your Wealth Plan...

Includes all the components of the Estate Plan, plus we prepare an asset spreadsheet confirming what you own and how each asset is held. Then we complete all of the documents necessary to transfer each asset and designate beneficiaries for maximum protection of your family and your assets.

Single \$ 4,500 - 5,500  
Married \$ 5,000 - 7,000

#### Your Legacy Plan...

Provides the same guardianship and inheritance planning of the other three plans yet goes far beyond those levels. Depending on your family's needs, the Legacy plan may include additional trusts for life insurance and/or IRAs. Additionally, the Legacy plan will provide for your beneficiaries with special needs and has the most flexibility for charitable giving.

Single \$ 6,000+  
Married \$ 7,500+