



BUILDING A LIVING & LASTING LEGACY

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EVANS

LEGACY LAW GROUP LLC

Your Legal Wealth Strategist

HOW TO USE THIS BROCHURE

Throughout this brochure are interactive QR Codes you can scan with your phone or tablet. These codes take you to links that provide even more information on that topic! Use the instructions below to navigate to these supplemental pages:



1. Open the camera app on your smartphone or tablet.

2. Hold your device over a QR Code so that it's clearly visible within your smartphone's screen.

3. Hold your device so that the QR code appears in the viewfinder in the Camera app. Your device recognizes the QR code and shows a notification.

4. Tap the notification at the top of your screen to open the link associated with the QR code.

If for any reason the codes or your camera aren't working, there's a link at the bottom of each page that you can type directly into your web browser.



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HOW TO DESIGN YOUR UP-TO-DATE COMPLIANT & TAX EFFICIENT ESTATE PLAN

What does your estate plan do for you? You might immediately think that your estate documents divide your assets after your passing. At least that's what most people would expect their plan to do.

While that's a major component of your estate planning process, it doesn't cover everything. What most of us want is an estate plan that:

- Keeps you in control of your assets
- Takes care of those you love the way you hope and want
- Will not cause your family to scramble in a time of crisis
- Protects the inheritance you leave your loved ones from divorcing spouses and creditors
- Minimizes taxes (including income taxes) for your loved ones following your passing

- Avoids unnecessary court processes, costs and legal fees
- Changes with your family and financial dynamics, and keeps up with the ever changing law
- That is private, not available for public consumption
- Has a game plan with full support for your loved ones should you become mentally incapacitated and
- Addresses your own unique goals and concerns

Continue reading this guide to discover how to create the best plan for you and your loved ones.

BUSTING ESTATE PLANNING MYTHS & MISCONCEPTIONS

ESTATE PLANS ARE JUST BOILERPLATE...

It's no wonder so many clients believe this, as we see so many plans that are. A good estate plan is anything but boilerplate. That's why we take the time to work with you at the onset of our relationship to ask specific questions about your goals and concerns.



HIGH FEDERAL ESTATE TAX EXEMPTIONS RENDER PLANNING MEANINGLESS...

Even if your estate is currently below the amount that would result in a federal estate tax, there are many other reasons to update or create your plan. Income tax planning affects nearly all estates, especially if you have unrealized capital gains, an IRA or 401(k) account, or own an annuity. We find many plans lack income tax planning when that should've been a primary consideration.



ONLINE DOCUMENT PREPARATION WILL CREATE A PLAN THAT WORKS FOR ME...

An online plan falls woefully short for most clients with any degree of net worth. There are many hidden traps for the unwary that we'll point out to you during our planning process that you won't get with online document preparation.



BUSTING ESTATE PLANNING MYTHS & MISCONCEPTIONS

MY BANKER TOLD ME TO PUT ALL THE ACCOUNTS IN JOINT NAME, TRANSFER ON DEATH OR PAY ON DEATH...

We call this the poor man's estate plan. It might work if all you have is a small savings account. By placing accounts in joint name, you may have created a taxable gift, and your loved ones won't receive a full step up in tax cost basis at your death, meaning that capital gains taxes aren't minimized as they should be. Further, you may have subjected your assets to your joint account holder's creditors or divorcing spouses or even thwarted the estate plan you've put into place.



I MADE AN ESTATE PLAN YEARS AGO...

While it's essential to have an estate plan, assuming that an estate plan created years ago is still effective can be misleading. Estate planning is not a one-time event but rather an ongoing process that should be reviewed and updated periodically to ensure it reflects your current circumstances and intentions. To ensure the effectiveness and relevance of your estate plan, it's recommended to consult with an experienced estate planning attorney or professional who can guide you through the process of reviewing and updating your plan based on your current circumstances and legal requirements.



MEET OUR LEAD COUNSEL: SHANISE EVANS



WE BELIEVE THAT ESTATE PLANNING IS ONE OF THE MOST POWERFUL EXPRESSIONS OF LOVE THAT ENABLES OUR CLIENTS TO NOT ONLY CREATE A LEGACY BUT ALSO ALLOWS THEIR LOVED ONES TO EXPERIENCE THEIR LEGACY.

Shanise Evans leverages her experience, passion and relentless ambition to leave a lasting mark on the world. Her legacy plans are designed to ensure that her impact resonates beyond her life's work.

We're looking for clients who value an ongoing relationship with their estate planning firm. Your loved ones will meet us, and we want to be there when your plan is needed the most.

DISTINCTIONS

Member of the State of Illinois Bar Association

Member of the State of Missouri Bar Association

Member of the Esteemed National Wealth Counsel Organization



EXPERIENCE WITH HIGH NET WORTH CLIENTS & BUSINESS OWNERS

Associate Trust Counsel,
A. G. Edwards

Attorney and Wealth Strategist,
Edward Jones

Fiduciary Advisory Specialist,
Wells Fargo

Vice President, Bank of America
Merrill Lynch

Planned Giving Specialist,
Northwestern Memorial
Foundation

BOARDS & MEMBERSHIPS

Greater North Shore Estate
& Financial Planning Council

Lake Forest-Lake Bluff History
Center

Chicago Estate Planning Council
(Diversity and Networking
Committees)

Illinois State Bar Association
(Trusts & Estates Committee)

Lake County Bar Association
(Trusts & Estates Committee)

Missouri Bar (Probate and
Trust Law Committees)

WHAT MAKES US DIFFERENT? WE HELP YOU PREPARE FOR BOTH LIFE & LEGACY

With 21 years in the industry, we at Evans Legacy Law Group have counseled many individuals, families, businesses, and philanthropists prepare for their futures. What we discovered early on is that estate planning was not designed to serve growing families who experience lots of change on their way to success.

It was designed to serve aging adults preparing for death. We aim to change that paradigm. What makes our firm different is that we are not here to create a set of documents you will likely never update or look at again.

Instead, we are here to ensure your loved ones have someone to turn to when you are no longer here. And we want to support you in planning for not just legacy (what you leave behind when you are gone), but for life as well.

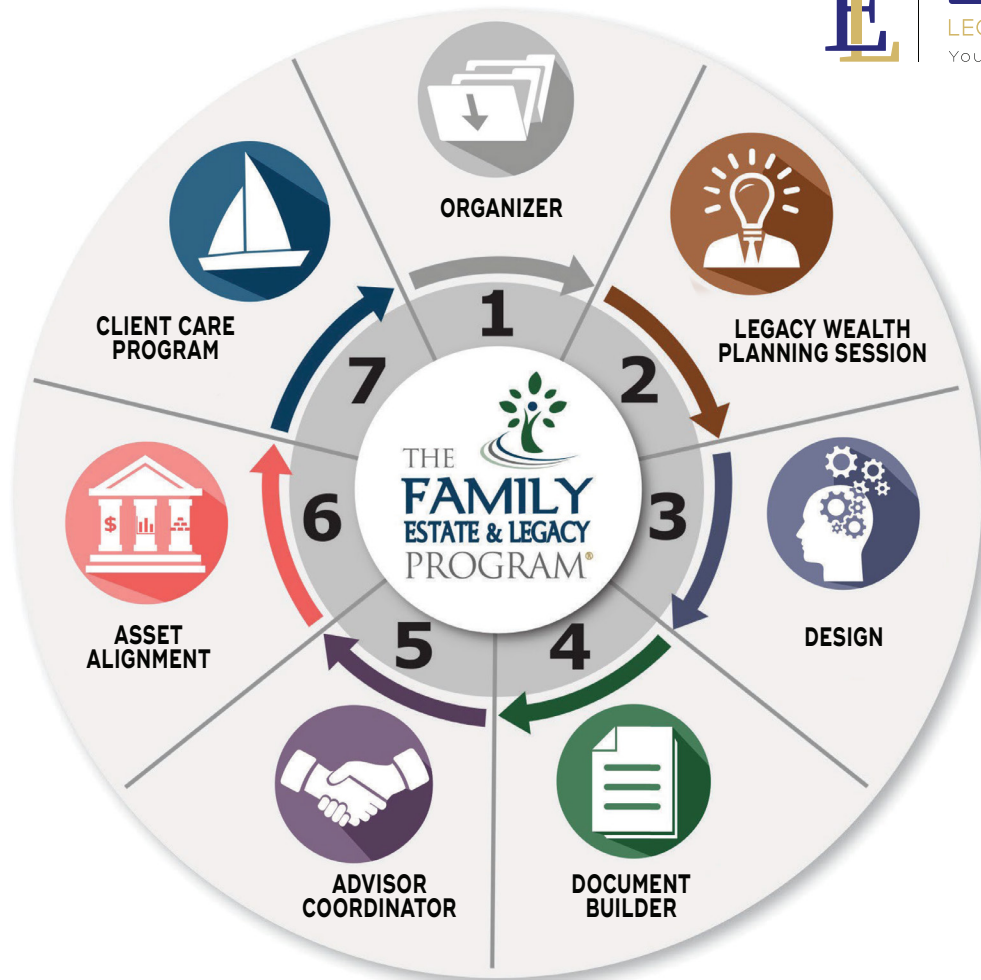
We've been told by many of our clients that the experience of considering their own death before and during their Legacy Wealth Planning Session, in the way we take you through the experience, offers a deeper and better experience of life afterwards.



We understand you are busy; you are growing, you desire a life of prosperity and you value ease, convenience and efficiency. You want to know you've made the best decisions for your family during your lifetime and that your family will be left with ease and aware of your love by how well you prepared.

You want to make sure your children will be taken care of in the best way possible and will be properly prepared to receive your wealth, when it is time.

OUR TRADEMARKED PROCESS



1. CLIENT ORGANIZER

To provide the best legal advice during our initial conference, complete the confidential Client Organizer thoroughly. This analysis starting point includes the facts we need to ask you pertinent questions.



2. LEGACY WEALTH PLANNING SESSION

In our initial conference, we'll discuss your key goals, concerns, and decision-makers. These insights will inform your estate planning strategies. Choosing responsible parties to execute your final wishes will also be addressed.



PERSONALIZED FOR YOU

3. DESIGN

We'll customize a will or trust package to your family, finances, goals, and concerns. The Design element considers assets, ownership, taxes, and more for your personalized plan. You'll receive a fixed fee quote for our services.



4. DOCUMENT BUILDER

Based on the Design phase, we'll create your documents and include flowcharts and summaries for clarity. You may take the time you need for questions and revisions to the initial draft. We're here to address any concerns you have.



5. ADVISOR COORDINATOR

We welcome involving your trusted attorney, CPA, or financial advisor in the process. Notify us and we'll invite them to your meetings or conference call them in, if they're not local. We prioritize transparency for comfort and clarity.



6. ASSET ALIGNMENT*

Asset alignment is often overlooked in estate planning, yet it's vital for revocable and retirement plan trusts. Aligning all assets like real property, bank accounts, investments, business interests, and intellectual property is crucial. Package options include asset alignment services like done-with-you or done-for-you.



7. CLIENT CARE PROGRAM*

Your estate plan comes with one complimentary year in our Client Care Program, which keeps your documents current with legal, tax, and financial changes. This program also monitors your family and financial situation, and ensures that new assets are titled correctly in consultation with our team.



*The Asset Alignment Process and Client Care Program are for revocable trust plans only and are not included in the Basic Plan.

WHAT'S THE PRICE?

WE VALUE TRANSPARENCY AND WILL QUOTE A FIXED FEE FOR OUR SERVICES AT YOUR FIRST MEETING WITH US.

LEVELS OF PLANNING	FEATURES	
BASIC PLAN STARTING AT \$3,500	<ul style="list-style-type: none"> • New or restated revocable living trust • Related pour-over will • Durable powers of attorney • Health care surrogates • Living will • Related ancillary documents • Disability clearly defined 	<ul style="list-style-type: none"> • Trustee responsibility conversation • Amounts ultimately distributed outright and free of trust • ASSET ALIGNMENT AND CLIENT CARE EXCLUDED IN THIS LEVEL OF PLANNING
FOUNDATIONAL PLAN STARTING AT \$3,750	<ul style="list-style-type: none"> • New or restated revocable living trust • Related pour-over will • Durable powers of attorney • Health care surrogates • Living will • Related ancillary documents • Disability planning/distributions 	<ul style="list-style-type: none"> • Trustee responsibility conversation • Amounts ultimately distributed outright and free of trust • Asset alignment options • One year of ESSENTIAL client care
SIGNATURE PLAN STARTING AT \$5,850	<ul style="list-style-type: none"> • New or restated revocable living trust • Related pour-over will • Durable powers of attorney • Health care surrogates • Living will • Related ancillary documents • Disability planning/distributions 	<ul style="list-style-type: none"> • Trustee responsibility conversation • Continuing trusts will be created for your ultimate beneficiaries • Asset alignment options • One year of ESSENTIAL client care • Discussion of estate & transfer taxes
TRANSFORMATIVE PLAN STARTING AT \$9,000	<ul style="list-style-type: none"> • New or restated revocable living trust • Related pour-over will • Durable powers of attorney • Health care surrogates • Living will • Related ancillary documents • Disability planning/distributions • Trustee responsibility conversation • Continuing trusts will be 	<ul style="list-style-type: none"> created for your ultimate beneficiaries • Asset alignment options • One year of ELITE client care • Income tax review • Estate & transfer tax review • Retirement Plan Trust and special beneficiary designations • Advanced IRA, 401(k), pension and profit sharing planning

*Add-on options available for all plans except Basic Plan.

GETTING STARTED CHECKLIST

TO PREPARE FOR YOUR INITIAL CONSULTATION PLEASE
DO THESE THREE THINGS AS SOON AS POSSIBLE.

ATTEND OUR WORKSHOP OR WATCH THE VIDEO

Watch our video on essential estate planning elements if you haven't attended our workshops. We'll email you with a link, so you can watch it on any device.



COMPLETE YOUR LIFE & LEGACY CLIENT ORGANIZER

We require a completed Client Organizer from you no less than three days before our initial conference to provide accurate legal advice. Your information is confidential and necessary. Find a hard copy in the brochure's back pocket or a digital version in an email we'll send you. To access the digital version, scan the QR code.



DROP OFF COPIES OF YOUR CURRENT PLANNING DOCUMENTS

When you get us your organizer, please provide us copies of your current:

- Keeps
- Wills
- Trusts
- Irrevocable Trusts
- Federal Gift Tax Returns Form 709, if applicable
- Federal Estate Tax Returns Form 706 for your spouse, if applicable

Bring us what you can of these documents.

Email us a PDF copy, if possible; otherwise, we'll scan in the items and return the originals to you.

Blank lined area for notes or writing.



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