




Original Slide

LEVEL ONE	LEVEL TWO	LEVEL THREE
 <p data-bbox="131 327 415 354">FAMILY PLAN</p>	 <p data-bbox="502 327 772 354">TRUST PLAN</p>	 <p data-bbox="840 327 1149 354">WEALTH PLAN</p>
<p data-bbox="112 380 357 393">FOR THE FAMILY WHO ...</p> <p data-bbox="112 401 434 576">Doesn't have assets that would go through the court process called probate upon death, but who do want to guarantee their minor children are well cared for no matter what, their health care wishes are turned into directives and their loved ones are able to access their assets using a durable power of attorney if they become incapacitated.</p> <p data-bbox="112 598 367 616">Keeps your family out of conflict.</p>	<p data-bbox="473 380 724 393">FOR THE FAMILY WHO ...</p> <p data-bbox="473 401 792 554">Wants the total assurance and peace of mind of knowing your family would stay out of Court and out of conflict, in the event of your death or incapacity. And wants to ensure assets will be transferred to heirs with the most ease and convenience possible in the privacy of our office without court involvement.</p> <p data-bbox="473 576 792 633">Under this plan, you may also opt to protect your beneficiary's inheritance from lawsuits, spouses and estate taxes.</p>	<p data-bbox="834 380 1091 393">FOR THE FAMILY WHO ...</p> <p data-bbox="834 401 1149 518">Wants the total assurance and peace of mind of the Trust Plan AND also all of the comfort of knowing that assets transfers have been taken care of by our office, so nothing is left out or lost because you got too busy.</p> <p data-bbox="834 540 1130 616">This plan is appropriate for busy families who want the least amount of personal effort and the greatest amount of convenience and care.</p>
<p data-bbox="112 666 328 682">YOUR FAMILY PLAN ...</p> <p data-bbox="112 693 434 868">Includes your Will, Health Care Directives & Powers of Attorney so you know that you are well taken care of if anything happens. Also, includes the Kids Protection Plan® to ensure your children are always raised by the people you want, in the way you want and never taken out of your home by the authorities.</p> <p data-bbox="112 889 425 928">May include post-death trust planning to protect assets for the people you love.</p> <p data-bbox="112 950 357 966">We've got your family covered.</p>	<p data-bbox="473 666 685 682">YOUR TRUST PLAN ...</p> <p data-bbox="473 693 782 748">Provides peace of mind knowing we are here to guide you during life & care for your family later.</p> <p data-bbox="473 769 782 846">The Trust Plan keeps your loved one's out of Court, all of your affairs totally private & ensures your family can turn to us when necessary.</p> <p data-bbox="473 868 792 966">All asset transfers will be handled by you, with unlimited guidance and support from us. A Kids Protection Plan® will be included if you have minor children.</p>	<p data-bbox="834 666 1062 682">YOUR WEALTH PLAN ...</p> <p data-bbox="834 693 1130 791">Includes all components of the Trust Plan PLUS we analyze how each of your assets are titled and handle all asset transfers for you to guarantee your plan works for your family.</p> <p data-bbox="834 813 1130 911">We prepare a Family Wealth Inventory, complete all bank, brokerage, insurance and retirement account documents to transfer title and change beneficiaries.</p>
<p data-bbox="112 1015 396 1031">FEE LEVEL: \$2,500-\$4,500</p>	<p data-bbox="473 1015 763 1031">FEE LEVEL: \$4,500-\$6,500</p>	<p data-bbox="834 1015 1110 1031">FEE LEVEL: \$6,500-\$8,500</p>

Our Life Fulfillment Plans

Reflections Life Planning, LLC.	Family Plan	Trust Plan	Wealth Plan
Assets will not go to probate court	✓	✓	✓
Children will be taken care of	✓	✓	✓
Will, health care directives, and Powers of Attorney	✓	✓	✓
Kids Protection Plan®	✓	✓	✓
Post-death trust	✓	✓	✓
Durable power of attorney for loved ones	✓	✓	✓
Beneficiary is protected from lawsuits, divorce and estate taxes		✓	✓
Asset transfers managed by client	✓	✓	
Asset transfers managed by office			✓
Office completes all account documents and title transfers			✓
Unlimited asset transfer assistance		✓	✓
Analysis of all titled assets			✓
Fee level:	\$2,500 to \$4,500	\$4,500 to \$6,500	\$6,500 to \$8,500

Changes explained:

- Font sizes are too small and the text and images are fuzzy.
- Colors are used to differentiate check marks, and also to subconsciously urge the client to choose the most attractive color, the green column, which is the most expensive product.
- Rows of grey to differentiate the lines increase ease of reading.
- The font of the three plans offered are cute and warm. These look attractive compared to the regular font in the chart, which in the end is still a lot to read. The attractive font and the colored check marks quickly allow clients to see how many benefits each plan offers.

Original Slide

\$1,000 QUESTION

*HOW DO YOU WANT YOUR KIDS TO RECEIVE YOUR
ASSETS
AFTER YOUR DEATH?*

Option one – ages and stages

- Common trust until kids reach certain age or ages
- Risk from creditors, predators and divorce
- Risk of exploitation of and waste by immature and vulnerable young adults being taken advantage of
- Included in child's taxable estate

Option two – Gift of lifetime asset protection

- Start with common trust or separate trusts for each child
- Hold assets in trust for lifetime of beneficiary(ies)
- Lifetime protection from bankruptcy, creditors, predators, divorce and estate taxes
- Child gets control in stages, co trustee and sole trustee at determined ages
- Protection from mental illness, drug problem, gambling, etc.

The **MILLION DOLLAR** question...

**How do you want your
children to inherit?**

Changes explained:

- The original slide had far too much information on it.
- Split the slide so they have time to get ready for the subject change, and start thinking about the question.
- Each slide should be “on brand” with slide background, colors, fonts, etc. Logo must be on every page.

Two types of inheritance:



COMMON TRUST

- Common trust until they reach certain age(s).
- Risk from predators, creditors, and divorces.
- Risk of exploitation or carelessness.
- Included in their taxable estate.

Two types of inheritance:

1

COMMON TRUST

- Common trust until they reach certain age(s).
- Risk from predators, creditors, and divorces.
- Risk of exploitation or carelessness.
- Included in their taxable estate.

2

LIFETIME ASSET PROTECTION

- The common trust holds assets for each child's lifetime.
- Lifetime protection from bankruptcy, creditors, predators, divorces, and estate taxes.
- They get control in stages, such as predetermined ages.
- Protection from gambling, mental illness, drug problems, and more.

Changes explained:

- The 2 types of inheritance are separated, because the client will read the text, and then turn their attention back to the speaker. This is generally quick enough that it does not require a pause.
- If both types are put up at once, clients will be reading the slide and not listening to the speaker. The speaker's pause will have to be longer.
- The speaker must therefore choose whether they prefer to break up slides, or put in a longer pause, so clients have time to read the whole slide.

Changes explained, continued:

- I prefer to break up the slides with less information on each so I have a larger percentage of the client's attention.
- Some people might need extra time to read, and having less text to read is easier on them.