FLAMMIA
ELDER LAW FIRM
MEDICAID PLANNING | TRUSTS | WILLS | PROBATE

Family United Plan

Our purpose is to keep the harmony through your journey in life, so your estate plan works when you need it to. Plan *Your Future, Your Way*!

Ongoing Reasonable Access to our Firm

Our Team is readily available to answer your questions or concerns during work hours whether on the phone, via email or in person. You will not be billed for calling to ask a question or sending an email about your estate plan. You will have access to priority appointments during normal business hours within one week of request.

Client Educational Opportunities

Free educational workshops related to estate planning, a complimentary consultation with your Trustee or Successor Trustee, including a free Successor Trustee Handbook (valued at $500) to educate your successor trustee on their duties

Work as a Team with your financial planner, CPA or insurance professional

Our team will work with your team to ensure that you and your family's goals are met. We will provide copies of your estate planning documents to your financial professional advisors upon request, with guidance to implement your wishes.

Asset Alignment, Asset Review and Continuous Asset Alignment

We aligned your assets at the time you completed your trust. Our team will review annually, or more frequently upon your request, ownership and beneficiary designation of your assets to ensure that your plan works. We will send you an annual report to verify that all of your assets are properly integrated and to determine if additional alignment is needed due to changes or additions to your assets.

Estate Planning Document Updates

We believe that estate planning is a process and not a transaction. There will be changes in your life and changes in the law. Our Program is the vehicle to efficiently update your documents to ensure your plan is up to date and provide you with peace of mind.

Family Care Meeting

Your family, when listed as your fiduciaries, are an integral part of your Estate Plan, as are your financial planners, CPA and insurance agents. This meeting provides an opportunity to answer your questions or concerns.

Additional Member Benefits

- Free Notary Services
- Waive Travel fee for signing of EP documents
- Free Advance Directives for children 18-25 years old
- Secured digital storage of your executed EP documents
- Limit trust administration fee to 1%(normally 2.25%)

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