



### We Don't Do "Traditional" Estate Planning...

We build relationships over time with our clients and their advisors rather than merely producing legal documents -- documents alone won't take care of the family when it counts.

#### Problems We Help Solve



Estate plan documents not adjusting to evolving tax laws, resulting in 40% estate tax and unnecessary capital gains taxes.

Assets not being aligned with the estate plan causing delays and expenses with financial institutions and probate court.

Family conflict resulting from lack of communication with trustees and beneficiaries.

Lack of preparation of the trustee and beneficiaries for their role in the estate plan.

Estate plans completed years ago aren't reflective of a family's current situation and wishes.



#### Ongoing Access To Our Firm

You will have priority appointments and priority access to all team members as needed. Response time is one business day.



#### Initial And Ongoing Asset Alignment

Our team will perform a biennial review of your assets to ensure they are properly aligned with your estate plan. We are available to help as assets are changed or newly acquired.



#### Family Care Meeting

This meeting allows an opportunity for us to meet with your trusted family members and/or advisors to explain who will be executing your estate plan and address questions as well as discuss any potential issues.



#### Estate Plan Document Review And Updates

We will perform a biennial review of your estate plan summary to assess if plan updates or a meeting are needed. We are available as your personal and financial circumstances change.



#### Collaboration With Your Other Trusted Advisors

Our team will communicate with your other trusted advisors to ensure we are all working toward the mutual goal of taking care of your family. Copies and/or portal access to your estate plan documents are available for your trusted advisor(s) upon your approval.



#### Client Educational Services

We provide regular webinars and newsletters targeted toward our Legacy Program clients, their advisors, their families, and their designated "helpers."

The Future Is Unknown...

**WE BUILD A FOUNDATION FOR LASTING SUCCESS**

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Updated June 2023