



Estate Planning

PCS Customer Journey

Building wealth is only half the job. Protecting wealth for your loved ones and yourself is equally important. In reality, every adult needs an estate plan, especially if you own property and/or have children.

Each Client that buys an Estate Plan receives:

Will – Everyone needs a Will. For those with minor children, it allows you to name Guardians who will care for your little ones should something happen to you. It also allows you to authorize a Trust to distribute the assets. A Will alone, however, is not sufficient.

Trust – A Trust is a non-probate instrument. This means it does not have to involve the courts to distribute the assets of the estate or to pay off creditors. Trusts also allow you to include provisions on how the assets are distributed. This is something a will cannot do alone.

PCS Estate Plans also include these valuable services:

- Funding: Transferring Assets into the Trust
- Successor Trustee Instructions
- Changes
- General & Health Powers
- General Power of Attorney
- Health Care Directive

Total Value: \$5,000 - 10,000
Actual Cost: \$1,995 - \$2,995