



CLAIM MY LEGACY™ VALUE STACK™

FIELD RESOURCE • V1.0

DISCOVERY FIRST. VALUE SECOND. PRICE AFTER VALUE.

Use the Value Stack only after the Family Legacy Review™ is complete and the family has confirmed what matters to them.

DOCUMENTS The estate planning documents appropriate to the family's situation, explained by what they are intended to accomplish rather than by overwhelming the family with document names.	FUNDING Guidance that helps the family understand that creating a trust and connecting appropriate assets to the plan are different steps. Legal, tax, insurance and financial decisions remain with the appropriate professionals.
ORGANIZATION A clear, organized Legacy Binder™ that helps the family picture the day a child, successor trustee or other trusted person may need to find and understand the plan.	FAMILY Bring the conversation back to where it started. The purpose is not the trust. The purpose is the people the plan is designed to protect.

DOCUMENTS + FUNDING + ORGANIZATION + FAMILY

"Let me show you how we help families address the things we just identified."

VALUE BEFORE PRICE

LOCAL ATTORNEY ESTATE PLANNING \$4,500+*	CLAIM MY LEGACY™ COMPLETE PACKAGE \$1,995
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*Estate planning fees vary by attorney or provider, plan complexity, family circumstances, and services included. \$4,500+ reflects local pricing observed by Claim My Legacy and is not intended to represent the fees charged by every attorney.

STATE THE INVESTMENT CLEARLY. GIVE THE FAMILY ROOM TO THINK. ANSWER THE QUESTION THEY ACTUALLY ASK.