

Zynergy's LEGACY Estate Planning Process

Our process to ensure that your estate planning accomplishes the following goals:

1. Properly passing custody of my most valuable possessions to those I intend
2. Reduces or eliminates taxes, probate costs, and delays.
3. Clear and well communicated
4. Simple to execute for heirs
5. Eliminating conflicts
6. Stays relevant

1. **Listen & Learn** (*Discovery & Goal Setting*)

- o Understanding family, assets, liabilities, and wishes.
- o Use comprehensive estate planning questionnaire
- o Schedule meeting with attorney to discuss wishes
- o Create a pre-meeting video discussing the estate planning process and the goals of the first meeting. Video should be short, simple, and in plain language.

2. **Evaluate Strategies**

- o Scrub estate situation against our list of strategies to make estate transfer as inexpensive as possible (taxes and expenses), as smooth as possible, as clear and well communicated as possible, conflict free, and properly passing custody of your most valuable possessions.

3. **Generate Documents**

- o Will, trust(s), healthcare directives, powers of attorney.
- o Attorney created
- o One-page summary and video of documents, their purpose, and why they are important

4. **Asset Alignment**

- o Updating beneficiary designations, retitling assets, aligning accounts with the plan.
- o One-page summary of all accounts, assets, titles, and beneficiaries that need to be changed.
- o Beneficiary value add every other year

5. **Catalog Legacy** (*Information Organization*)

- o Document storage digitally through Dropbox
- o Nok List every other year
- o Personal letters (LEGACY letter package)
- o Recorded videos for your heirs
- o Funeral/Memorial wishes (template of items preferred: readings, music, pallbearers, ceremony style, etc.)
- o LEGACY manual (a beautifully bound manual with step-by-step instructions for what to do, who to call, where to find things)
- o Password list

- o Digital scrapbook (A curation of personal stories, photos favorite family recipes, in a digital scrapbook format)
- 6. **Yearly Review**
 - o Discussion of wishes annually
 - o Review of documents every 3 years, or:
 1. If tax laws change
 2. If estate planning laws change
 3. If wishes change
 - o Attorney review every 6 years