

# HERITAGE CLIENT BENEFITS



- Free Changes for the Lifetime of the Trust
- Free Lifetime Support
- Free Preparation of 2 Quit Claim Deeds
- Free Funding Assistance
- Member of the BBB & never a complaint
- 18 Years Experience Preparing Living Trusts Nationally

## Every Heritage Living Trust Includes:

Abstract of Trust

The Living Trust

Schedules of the Trust

Personal Property Transfers

Amendments to the Trust

Asset Power of Attorney

Pour Over Will

Declaration of Living Will

Durable Power of Attorney for Health Care

Burial Instructions

Nomination of Conservator

Nomination of Guardian

Donation of Anatomical Gifts

Last Instructions to the Family

Essential Document Location

Settlor Trustee Instructions

## Plus

The Heritage Asset Organizer

The Heritage Living Trust Companion Book