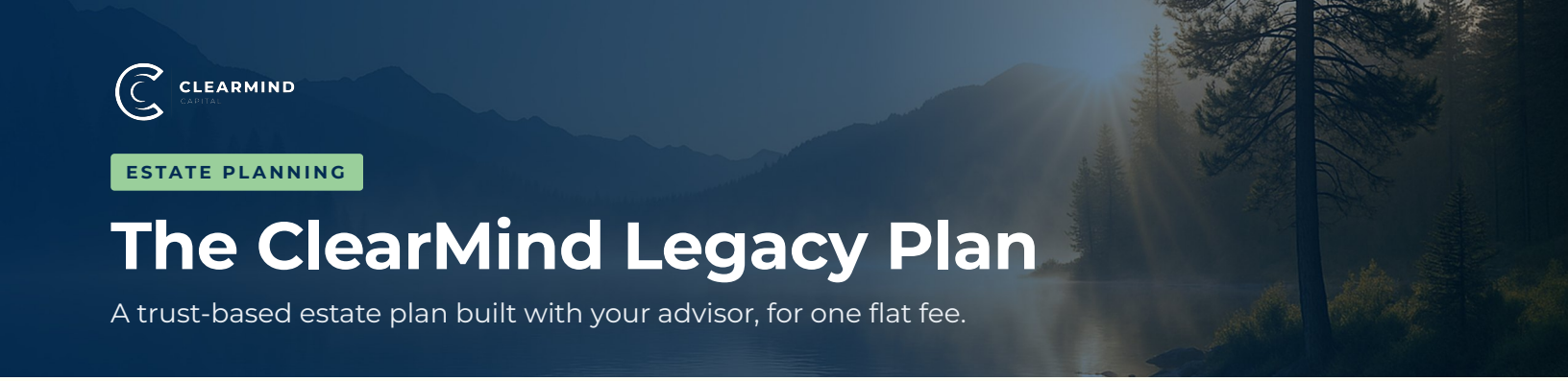


CLEARMIND CAPITAL

ESTATE PLANNING

The ClearMind Legacy Plan

A trust-based estate plan built with your advisor, for one flat fee.

What's included

- Revocable living trust (joint for married couples) with a certification of trust
- A pour-over will for each of you, with guardian nominations for minor children
- Financial power of attorney, health care power of attorney, advance directive, and HIPAA release for each of you
- **An independent attorney review** of your finished documents by an attorney licensed in Ohio, with a review letter, before you sign
- Your Ohio home deeded into the trust, county recording fees included
- A one-page visual summary of your whole plan, made by our team
- One round of revisions within 90 days
- Our help with signing and with moving your accounts into the trust

How it works

1 **Sign up.** Sign your agreement and pay your fee, and we send you our preparation kit.

2 **Legacy Plan meeting.** We walk through the five big decisions together and enter your choices.

3 **Review.** Your documents come back in one to two weeks, reviewed by an independent attorney. We go through every page and the attorney's letter with you.

4 **Sign and fund.** Sign at our office with a notary and witnesses, then we help fund your trust.

Most plans go from first call to signed in four to eight weeks.

ONE FLAT FEE

$1,500

Per household. Single or married, same price. Paid when you sign up.

Covers your documents, the attorney review, your deed, and every meeting with us. No hourly bills. **$1,200** if you don't own a home.

Our partner: EncorEstate Plans

Your documents are generated through EncorEstate Plans, estate planning software built for financial advisors. Before anything comes back to you, Encore's estate planners and paralegals check each plan with a 60-point review. Encore also arranges your attorney review and prepares and records your deed with the county.

If you need more

Each additional Ohio property	$300
Separate trust for each spouse	$850
A business interest into your trust	$100
30-minute call with the reviewing attorney	$300
Property outside Ohio	Quoted up front

Only if you need them, and only with your okay.

Good to know

ClearMind Capital and Encore are not law firms and do not give legal advice. The reviewing attorney works independently of us, and the review covers your finished documents. You're welcome to bring in your own attorney at any point. If you need an irrevocable trust, Medicaid planning, or advanced estate tax planning, we'll refer you to an estate planning attorney instead.

Questions? Call 614-618-0108 or visit clearmind-capital.com.

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