

SETTLEMENT SECURITY SYSTEM



The Importance of Settlement:

- ✓ Your Family Knows Who to Call for Assistance, and When
- ✓ Your Family Knows About Your Estate Plan and its Location
- ✓ Allow Your Family to Grieve Properly
- ✓ A Team To Make The Process Smoother
- ✓ Questions Answered
- ✓ Organized Support for Family and/or Surviving Spouses
- ✓ Continued Protections of Your Nest Egg from Creditors and Predators

For Spouses and Families:

- ✓ Survivor Support Program
- ✓ Organized Communication With Financial Advisors and CPA's
- ✓ Communication and Direction to Financial Organizations
- ✓ Communication and Direction to Life Insurance Companies

Advisors & Helpers:

- ✓ Team Approach
- ✓ Assurance Assets Are Moved Properly To Achieve Your Goals
- ✓ Assurance That Retirement Accounts Are Protected Properly
- ✓ Assurance That Tax Issues Are Protected and Resolved
 - ◆ Capital Gains Taxes
 - ◆ Income Taxes
 - ◆ Estate Taxes

