



ESTATE PLANNING, SIMPLIFIED.

Secure your future today
for peace of mind tomorrow.

ESTATE PLANNING

Everything You Need to Know

WHAT IS ESTATE PLANNING?

Estate Planning is about planning ahead and choosing who will be in charge of you, your family and your assets if you no longer can.

WHO BENEFITS FROM ESTATE PLAN?

An Estate Plan helps your loved ones left behind save time and money upon your passing. A well- thought out Estate Plan helps maintain control over who receives your assets when you pass on or become incapacitated, helps to reduce or eliminate estate tax, helps avoid tedious and costly probate process, and conservatorship.

WHO NEEDS AN ESTATE PLAN?

Everyone should have an Estate Plan. If you own anything of value, you will need a plan for how to pass it on. Estate Planning can make life a lot easier for your loved ones who won't want to be thinking about financial and legal matters after you become incapacitated or pass on.

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EASY STEPS TO ESTATE PLANNING

- 1 SCHEDULE A FREE CONSULTATION**
With Our Estate Planning Attorneys
- 2 DRAFT & REVIEW YOUR ESTATE PLAN**
Customized to Fit Your Needs
- 3 SIGN & REGULARLY REVIEW**
We Help Keep Your Estate Plan Updated



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CORE ESTATE PLAN DOCUMENTS

Protect yourself, your family and your assets if you pass on or become incapacitated.



REVOCABLE LIVING TRUST

- Helps avoid the high costs and delays of probate
- Appoints a successor trustee who will be in charge of your estate
- Allows you to control how and when your heirs will receive your assets
- Can provide lifetime asset protection for your heirs
- Can protect your heirs against creditors, substance abuse issues and staying qualified for government benefits



LAST WILL & TESTAMENT

- Nominates a back-up guardian for your minor children
- Ensures overlooked assets will be distributed through your Trust



DURABLE POWER OF ATTORNEY

- Appoints an agent who can make decisions on your behalf for legal and financial matters if you are incapacitated
- Avoids need for a court appointed conservatorship of your estate
- A comprehensive power of attorney will allow your agents to reallocate your assets in order to facilitate long term care planning



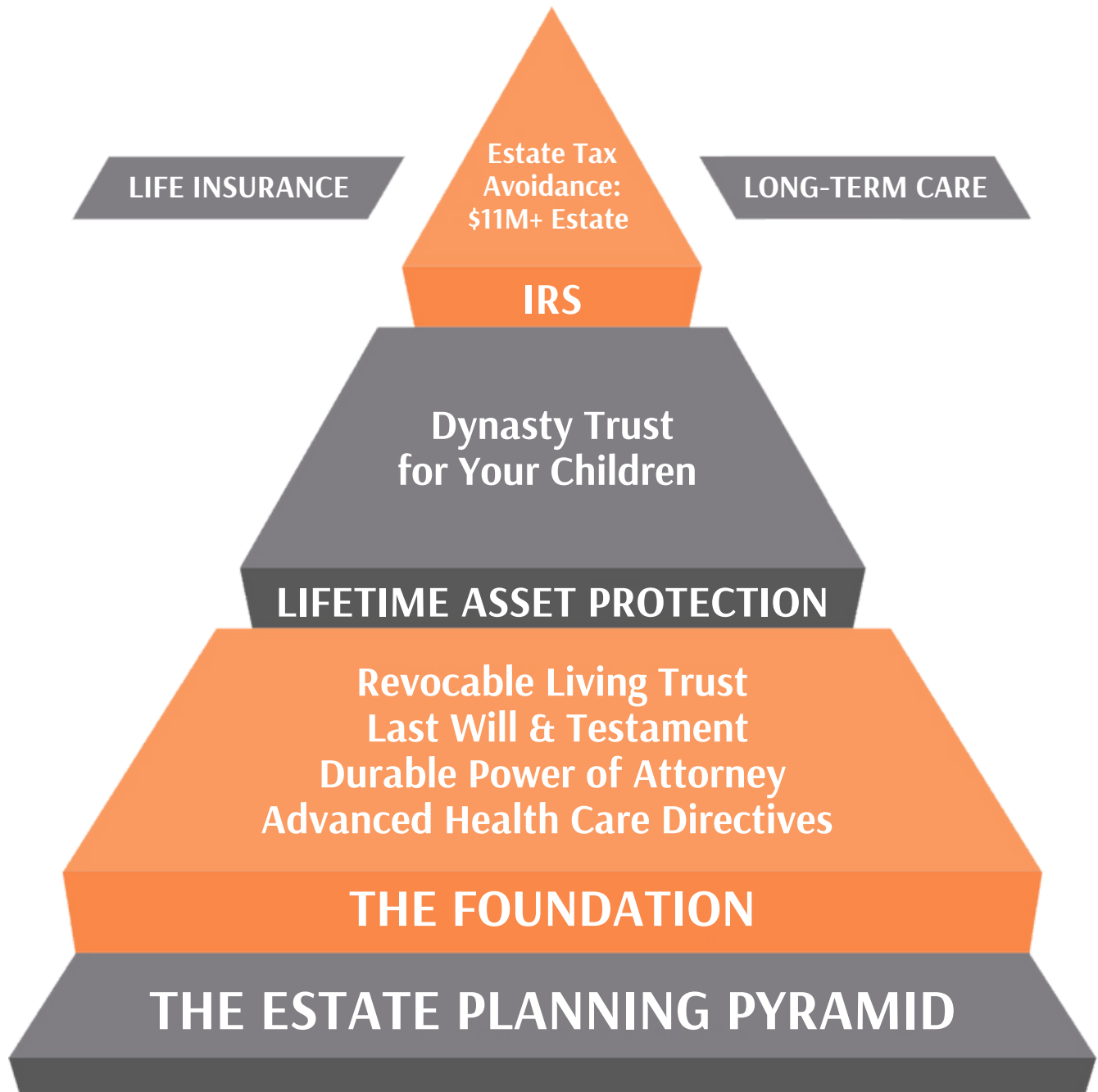
ADVANCED HEALTH CARE DIRECTIVES

- Appoints agent who will make healthcare decisions for you if you are incapacitated
- Avoids need for a court appointed conservatorship of your person
- Includes your Living Will which dictates the decisions your agent should make, if you are unconscious, on life support and your doctor has indicated that there is nothing else they can do for you

Our Attorneys can tailor your estate plan for today, and be flexible enough to grow with your family as things change.

WE CAN HELP

PROTECT YOUR FAMILY'S FUTURE WITH AN EFFECTIVE ESTATE PLAN



Prepare for your loved ones
and protect your assets.

FREE CONSULTATION

LIFETIME TRUSTS

For Your Beneficiaries



DYNASTY TRUST

Provides lifetime asset protection to your children for your estate.

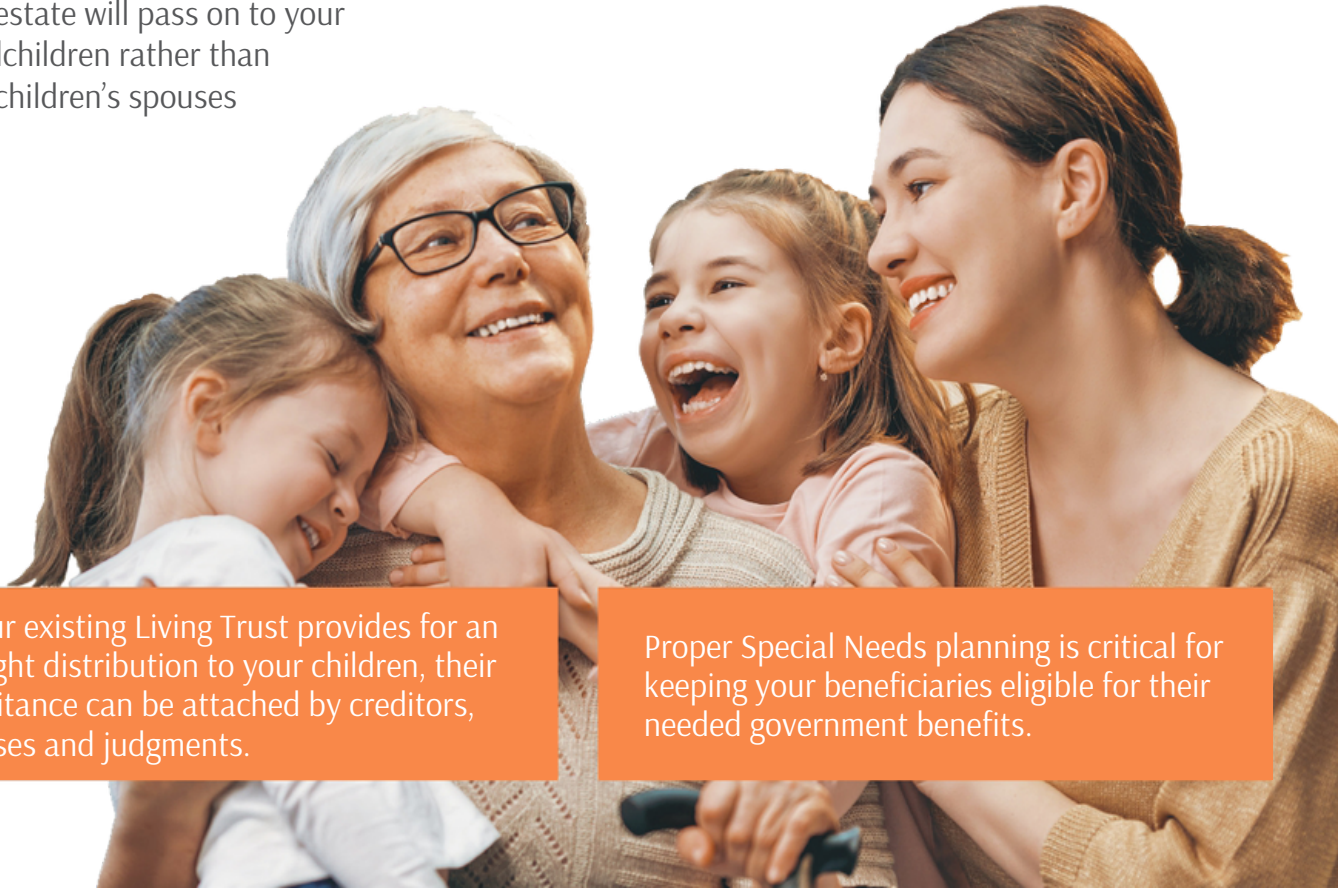
- A Personal Asset or Dynasty Trust is a provision in your Revocable Living Trust
- Your children's inheritance is protected from creditors, judgments, divorces
- Your children as Trustee can have complete control over their share of the assets or;
- You can use a third party Trustee to manage assets until your children reach a certain age or for their lifetime
- You can make it more likely that your estate will pass on to your grandchildren rather than your children's spouses



SPECIAL NEEDS TRUST

Protect your beneficiary's Medi-Cal or SSI Benefit with a Special Needs Trust.

- Outright distributions or beneficiary designations to heirs who receive needs-based government benefits can jeopardize those benefits
- 3rd Person Special Needs Trusts are not subject to the Medi-Cal liens
- A beneficiary who receives an injury settlement or inheritance can now arrange for a 1st Person Special Needs Trust without court approval



If your existing Living Trust provides for an outright distribution to your children, their inheritance can be attached by creditors, spouses and judgments.

Proper Special Needs planning is critical for keeping your beneficiaries eligible for their needed government benefits.

AVOID COSTLY PROBATE

Spare your loved ones the stress

Probate court proceedings (during which a deceased person's assets are transferred to the people who inherit them) can be tedious, stressful and costly. This highlights the value of having an estate plan to avoid probate for any asset you own—real estate, bank accounts, vehicles, and so on—and to spare your loved ones the hassle.

Probate fees are set by California probate code § 10810, which caps the maximum fees that attorneys and executors can charge for a probate. There are additional costs for filing and appraisals fees.

AVOID PROBATE FEES WITH ESTATE PLANNING

- ✓ Save Time
- ✓ Save Money
- ✓ Save From Stress

*PROBATE FEES CHART (GROSS ESTATE)

Estate Value	Fees to Attorneys
\$100,000	\$4,000
\$200,000	\$7,000
\$300,000	\$9,000
\$400,000	\$11,000
\$500,000	\$13,000
\$600,000	\$15,000
\$700,000	\$17,000
\$800,000	\$19,000
\$900,000	\$21,000
\$1,000,000	\$23,000
\$2,000,000	\$33,000
\$3,000,000	\$43,000

*This probate fee chart is for informational purposes only.

DID YOU KNOW?

For Estates worth over \$12.9M,
the top estate tax rate is 40%.



WHY TRUST US?

Expertise & Experience



“Very impressed with Brian Chew & his practice. Quick response to my initial inquiry, zoom consultation happened shortly after & trust was complete the following week. Less than 2 weeks start to finish - quicker than another attorney could even schedule a consultation. Highly recommend!”

Kris B.



My wife and I are approaching our retirement years and we were looking for a Law Firm to help us get our affairs in order as we don't want to burden our kids with anything legal. We got a recommendation from a co-worker and had a great experience with OC Wills & Trust Attorneys. They helped us with a Living Trust which spells out everything to our kids and avoids a probate of our assets when we pass. We were very impressed with Brian Chew and the expertise he gave us with our Estate Planning!”

Randal C.



“Highly recommend! So professional, friendly, and very helpful with our questions. We really didn't know anything about setting up a family trust and Ellie and Ammi were terrific, and Diana as well who helped with doc signing. It was so much easier than I thought it would be!”

Stephanie R.



“We were extremely happy with the Estate Planning services we received via OC Wills and Trust Attorneys. Brian Chew, Anthony and the whole team were professional, responsive and patient in guiding us through setting up a trust and will. We were intimidated by the perceived enormity of the project but the team was organized, thorough and very understandable, simplifying the process to two short online meetings and one in-office document signing visit.”

Thomas E.



Our Attorneys can tailor your estate plan for today, and be flexible enough to grow with your family as things change.

FREE CONSULTATION

MESSAGE FROM OUR FOUNDER

I founded this firm in 2008 with the primary goal of creating comprehensive estate plans for our clients in a straightforward and easy to understand manner. Our team of experienced attorneys, who have created thousands of estate plans, approach our clients by asking three questions:

- 1 Who do you love?**
- 2 Who do you trust?**
- 3 How much do you trust them?**

By discussing the answers to these questions with our clients, we create an estate plan that best achieves your goals and addresses your concerns.






BRIAN CHEW
Founder & Principal
OC Wills & Trust Attorneys




OUR SERVICES

- ✓ Estate Planning
- ✓ Estate Tax Planning
- ✓ Special Needs Planning
- ✓ Deed Recording
- ✓ Medi-Cal Lien Avoidance

OUR LOCATIONS

-  Irvine
-  Huntington Beach
-  Anaheim Hills

CONTACT US

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FOLLOW US

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ATTORNEYS



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www.ocwillsandtrusts.com