

Gun Trust Plans: Our Process

1

Discovery & Design – we'll discuss your needs and concerns and determine which gun trust plan is appropriate. Generally 30-45 minutes by phone or in person.

2

Review & Signing – your completed gun trust and other docs will be sent to you for review, then we'll arrange for the Signing.

3

Maintain & Update – our Estate Protection Plan 2A provides annual reviews, free amendments, & continuing education.

Gun Trust Process (Cont.)

1

Discovery & Design – you teach us about your family and your current estate plan, we'll teach you about using a gun trust to complement it. Price quoted, ½ balance due.

2

Review & Signing – we review & revise until it's right. You can sign your gun trust in our office or in front of a local notary. Balance due at Signing.

3

Maintain & Update – a reasonable annual subscription (Silver & Gold plans only) ensures that your gun trust is always current, and also provides other benefits such as free amendments, discounted services for you and your family, exclusive events, etc.