



THE STANDARD LEGAL AND FINANCIAL GOALS FOR OUR CLIENTS AND FOR THE FUTURE AND PAST GENERATIONS OF THEIR FAMILIES

Harmony	➤ Harmony within the family and business
Asset Protection	➤ Protection from outside lawsuits and predator creditors
Tax Savings	➤ Reduced income and other taxes and complete elimination of death taxes
Avoid Probate	➤ Complete avoidance of probate court proceedings
Client Control	➤ Clients maintain control of their wealth and cash flow until they die or become disabled, then pass on that control to the appropriate persons in the next generations
Client Care	➤ Generous care of clients as long as they live
Progeny Care	➤ Intelligent and equitable treatment of children, grandchildren and future progeny
Emergencies	➤ Rapid access to current and enforceable emergency medical documents for all family members
Family Investments & Business Success	➤ Security and success of the family, investments and family business
Wealth Succession	➤ Passing the wealth as a growing dynasty from one generation to the next with good management and increases in value
Charitable Giving	➤ Using charitable giving to inspire the family and at the same time increase wealth, improve cash flow, reduce taxes and enhance the environment in which the family members live
Preventive Maintenance	➤ Utilize Periodic Preventive Law Reviews and procedures to keep the family wealth protection plan in superb order through the years in spite of increases changes in laws, economics, family goals and unexpected tragedies
Friendship Relationship	➤ Create a family and friendship relationship with our clients through many generations with systems to quickly resolve any discomforts
Enjoyable Relationship	➤ Be interesting, creative and have fun with our communications and meetings
Set Example	➤ Exemplify these standards in our own family and law firm