

Revocable Trust & Estate Planning Guide



Presented by 4th and 1 Mobile Services

Introduction to Estate Planning

Estate planning is an essential step in securing your assets and ensuring your loved ones are protected. At **4th and 1 Mobile Services**, we simplify the process, making it easy to create a legally sound **Revocable Trust or Will** that meets your needs.

Why Estate Planning Matters

- ✓ Avoid probate delays and court costs
- ✓ Protect your children and dependents
- ✓ Control how and when assets are distributed
- ✓ Appoint trusted individuals to manage your affairs
- ✓ Reduce financial burdens for your family



What's Included in an Estate Plan?

A well-structured estate plan includes:

- **Revocable Living Trust** – A flexible legal entity that holds your assets and allows seamless transfer after death.
 - **Last Will & Testament** – Specifies final wishes and guardianship for minor children.
 - **Financial Power of Attorney** – Appoints someone to handle financial matters if you're incapacitated.
 - **Medical Power of Attorney** – Designates a trusted person to make healthcare decisions for you.
 - **HIPAA Authorization** – Allows access to your medical records.
 - **Asset Distribution Plan** – Determines how and when beneficiaries receive their inheritance.
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Revocable Trust vs. Will – Which One Do You Need?

Feature	Revocable Living Trust	Last Will & Testament
Avoids Probate?	✓ Yes	✗ No
Controls Asset Distribution?	✓ Yes	✓ Yes
Requires Court Supervision?	✗ No	✓ Yes
Protects Incapacity?	✓ Yes	✗ No
Effective During Lifetime?	✓ Yes	✗ No

Key Takeaway: If you want to **avoid probate, control assets while alive, and simplify distribution**, a **Revocable Trust** is often the better choice.

Steps to Creating Your Estate Plan

1 Gather Information

- Your full legal name & DOB
- Spouse & children's information
- Social Security numbers
- Real estate & asset details

2 Choose Key Roles

- **Trustee (Trust) or Executor (Will)** – Manages asset distribution
- **Guardian** – Cares for minor children
- **Power of Attorney** – Handles finances & medical decisions if incapacitated

3 Define Asset Distribution

- Specify who inherits what and when
- Set age-based or conditional distributions
- List special bequests (e.g., charities, gifts)

4 Establish Healthcare Directives

- Create a **Living Will** for end-of-life care
- Assign a **Medical Power of Attorney**
- Determine organ donation preferences



5 Finalize & Store Documents Safely

- Sign and notarize documents
 - Store copies in a safe place
 - Provide key individuals with access
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How 4th and 1 Mobile Services Can Help

We offer **mobile and remote estate planning services** designed to make the process effortless.

☀ Affordable Pricing:

- **Revocable Living Trust** – Starting at **\$600**
- **Last Will & Testament** – Starting at **\$175**

📌 Our Services Include:

- ✓ Customized estate planning documents
- ✓ Mobile notary services
- ✓ Step-by-step guidance
- ✓ Secure storage recommendations

🔗 **Start your estate plan today!** Contact **4th and 1 Mobile Services** for a **free consultation**.



Contact:
Joseph D. Smith
770-256-5725
support@4thand1mobile.com