

## HOW DOES LEGACYGUARD SAVE MY FAMILY MONEY?

Probate fees have historically ranged from 3% up to 7% depending upon the size of the gross estate and other factors. The gross estate is the actual value of everything you own...not your net worth! For an estate valued at \$400,000, after exclusions and exemptions, as an example, Probate fees at 3% would cost the estate \$12,000 compared to the initial cost of LEGACYguard at \$1,475.

Even with adding twenty years of annual review fees, the total cost of LEGACYguard would still be less than 20% of the projected Probate fees.

## WHAT ARE THE CONSEQUENCES FOR MY FAMILY WITHOUT ESTATE PLANNING?

Without planning and even with only a simple Will, the Probate Court controls the disposition of your estate. And should you become unable to manage your affairs, the Probate Court would appoint who it wants to represent you. Finally, Probate proceedings are open to the public and can take six months up to a year and longer before the estate is settled.

With LEGACYguard, the above can be avoided. Your estate may be settled in a matter of days and privately, your wishes can be clearly communicated to your family and thousands of dollars can be saved in process.

## GETTING STARTED WITH LEGACYGUARD

Your LEGACYguard Provider will help you assess the extent to which your estate may be exposed to the risk of Probate and possible Federal estate taxes while answering any questions you have. Once that is finished, the Provider will help you complete the application form and sign the Attorney Representation Agreement. The forms and their respective fees are then forwarded to TASC soon after which the attorney will call to begin consultations with you.

If you have any questions, you can contact the LEGACYguard Sales Department at 1-800-422-4661 or at [sales@tasconline.com](mailto:sales@tasconline.com).

*LEGACYguard may not be appropriate for all estate planning needs. Individual cases may require alternative planning strategies.*



## PLANNING FOR THE LEGACY YOU WANT TO LEAVE YOUR FAMILY

AVOID UNNECESSARY FEES AND TAXES WITH THE AFFORDABLE LEGACYGUARD PLAN.



**TASC**  
TOTAL ADMINISTRATIVE SERVICES CORPORATION  
2302 INTERNATIONAL LANE, MADISON, WI 53704-3140  
800-422-4661 • 608-241-1900

©ALL RIGHTS RESERVED.

LG-3727-011106

## LEGACYGUARD HELPS ORGANIZE AND PROTECT YOUR ESTATE

The risks our estates (everything we own) are subject to come in many forms...any one of which could threaten our financial longevity. Planning for retirement and guarding against these risks has become a necessity for many. And for business owners whose businesses may be the primary source of the family's financial security, planning is essential.

LEGACYguard is an affordable and effective plan to help Clients enjoy the fruits of their labors and leave a legacy for their families. It also helps to organize estates and shield assets from Probate and unnecessary taxation.

## LEGAL SERVICES

An estate-planning attorney licensed to practice in your state will consult by phone with you, help shape your Plan, and then draft the legal documents for your approval. Free lifetime consultation is included with your Plan.

## TASC SERVICES

Assistance with implementation and lifetime annual reviews of your Plan are provided by LEGACYguard service representatives and Providers in your area. The annual check-up serves to maintain protection of estate assets and to address any questions that might arise.

If you ever need to change any portion of, or an entire document, you may do so. You remain in complete control of your estate assets after implementation of LEGACYguard.

## HOW DOES LEGACYGUARD AVOID THE EXPENSE AND STRESS OF PROBATE?

Probate and the expenses associated with it are avoidable by use of the Revocable Living Trust, a commonly used estate planning strategy. Stress is minimized by avoiding the Probate process and utilizing the LEGACYguard system. LEGACYguard provides these additional advantages:

- Family financial affairs remain private
- Legacy directives are clear and easy to administer by your successor trustee
- Estates can be settled in weeks, not months
- Guardianship and health care representative pre-determined in case of incapacity
- End of life advance directives pre-determined in case of incapacity
- Need for legal assistance reduced saving thousands of dollars
- Legal documents can be valid in all states
- Plan is available at an affordable price
- Peace of mind is achieved knowing the Plan can impact future generations

LEGACYguard is supported by TASC with over thirty years of protecting Client assets from exposure to unnecessary taxation and regulation.

## LEGACYGUARD SERVICES:

- Preparing Client for attorney consultation
- Assisting attorney with executing documents
- Assisting with implementation of Plan
- Facilitating easy management of Client records and legal documents
- Helping Clients to protect assets with life-long annual reviews

## LEGACYGUARD DOCUMENTS:

- Revocable Living Trust
- Will
- Health Care Power of Attorney
- Durable Power of Attorney
- Living Will
- Quit-claim Deed