

Legal Services Exclusive to Texas Agents:

With the repeal of the estate tax and inaction on the part of Congress, it is even more paramount for your clients to have an estate plan or have their existing plan reviewed.

In Texas, we have formed a relationship with an attorney, Brandon Carrell, to provide your clients with estate planning services at a significant discount.

Whether an update to a document is needed, or a Will or Trust package, either tax planned and non tax planned, you can provide your clients with access to discounted legal services.

Some of the documents included in the packages are:

"Pour-Over" Will (if a RLT Package)
Certification of Trust (if a RLT Package)
Declaration of Trust (if a RLT Package)
Assignment of Personal Property (if a RLT Package)
General Durable Power of Attorney
Health Care Powers (including "Living Will") which are HIPAA compliant
Burial Instructions
Distribution of Personal Property Instruction Form
Declaration of Guardian
Deed for Residence (if needed and if a RLT Package)
Deeds for other Real Property (if needed and if a RLT Package)
Deeds for Mineral/Oil & Gas Interests (if needed and if a RLT Package)
Letter of Instructions for Bank Accounts (if needed and if a RLT Package)
Letters of Instruction for Brokers, Mutual Funds and Direct Registration Accounts (if needed and if a RLT Package)
Stock Powers and transmittal letters for stock certificates held by client (if needed and if a RLT Package)
Letters of Instruction for change of beneficiary for Life Insurance, IRA's and Annuities (if needed and if a RLT Package)
Assignments for Business Interests, General and Limited Partnerships, LLC's, Notes and Deeds of Trusts, etc. (again, if needed and if a RLT Package)
Affidavit of Death of Joint Tenant (if property is still held in Joint Tenancy with a deceased spouse and if a RLT Package)
Explanation of the Will/Trust Provisions
Signing Instructions
Funding Instructions (if a RLT Package)

This is a great way to strengthen your relationship with your clients. **For more information, call Brandon Carrell directly at (800) 488-4015, ext. 503 and tell him you're with ALPC.**