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WWW.THEANDERSENFIRM.COM

- 1. Process designed to avoid estate plans that don't work**
 - a. Preparation**
 - b. Maintenance**
 - c. Legacy**
- 2. Education about how estate plans should work**
- 3. Analysis of the client's individual situation**
 - a. Review financial situation**
 - b. Review current plan to determine weaknesses**
 - c. Provide specific recommendations**
- 4. No cost for initial consultation**
- 5. Fixed fees**
- 6. Funding capability**
- 7. Reduced settlement costs**
- 8. Team Based Approach with CPAs, Financial Advisors, etc.**
- 9. Ensure proper trustees**
- 10. Bring the next generation into the planning process**
- 11. Multi-office, multi-attorney firm instead of a "one horse show"**
- 12. Asset protection techniques offered**
- 13. Knowledge of Advanced Planning Techniques**