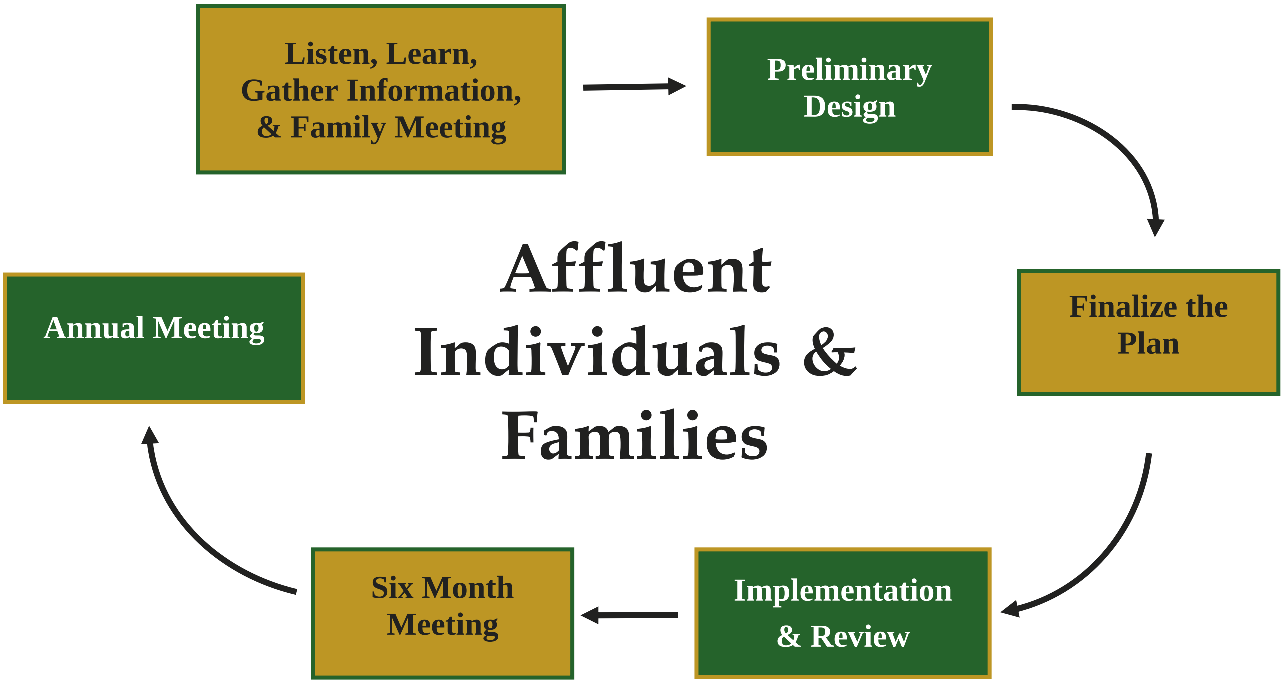
Wealth Strategies Design

At Eagle & Fein, we have enormous enthusiasm for helping successful people preserve and enhance their wealth. As members of the WealthCounsel, LLC and Fellows of the Esperti Peterson Institute, we are uniquely prepared to serve the high net worth client.



Our Process

We serve the specialized planning needs of high net-worth individuals and families by combining your legal, financial, tax, philanthropic, and business matters into a unified Wealth Strategies plan. We can:

- Solidify control over your affairs
- Assure the continuance of your lifestyle through tax-free conversions of paper profits
- Protect your wealth and income from legal judgments
- Eliminate or substantially reduce capital gain and income taxes
- Manage the value of your business interests
- Facilitate your ability to pass value, responsibility, and work stewardship ethics to your heirs
- Eliminate or substantially reduce gift, estate and generation-skipping taxes
- Keep your affairs free from publicity, and the costs and delay of probate

Listen , Learn, Gather Information, and Family Meeting

We review all of your financial information and existing planning documentation prior to meeting with you as a prospective client to determine whether or not our services will be especially valuable to your family. If we determine that we can be especially valuable to your family, we meet with you and your advisors for a day or two in our office to understand your every planning nuance and desire, and to heighten and expand your expectations. Based upon each of your needs and desires, we formulate the parameters of the engagements including all fees, deadlines, and responsibilities.

Preliminary Design and Review

We create your plan by analyzing, testing, and challenging every combination of planning theories and strategies that specifically meet your objectives and needs. Your comprehensive, dynamic, and understandable *Wealth Strategies* plan is built page by page through the use of narrative graphs, charts, models, and schedules. We take you step-by-step through the preliminary planning book, and record every reaction, critique, and idea to further tailor the plan.

Finalize the Plan

After the initial review and explanation of the design we present you with a polished book and set specific timelines and goals for the implementation of your plan. We assign every detail of the plan to the appropriate advisors for immediate implementation.

Implementation & Review

After the finalization of the design and every detail has been assigned to the appropriate advisor, you are provided with a checklist, which includes a time to review and then sign all of the required planning documents.

Six Month Meeting

Approximately six months after the signing of the planning documents, we meet again to review the implementation checklist to assure that all steps have been completed. At this meeting we make sure that everything is in good shape and address any concerns that you may have.

Annual Meeting

We continue to meet with you annually to analyze your plan. We discuss if any technical amendments are necessary, review the funding of your plan, review your goals and objectives to determine if additional income and/or estate planning strategies are necessary, update your cash flow and estate tax analysis, and address any other concerns you may have at that time.

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ATTORNEYS & COUNSELORS AT LAW
A PROFESSIONAL CORPORATION