The Estate Planning Process

R.E.A.P.. LLC is pleased you have selected our professional firm to assist you and your family in developing a secure estate, financial, and income plan. This process includes a complete, ***No Obligation*** review of your current estate, financial, and income plan, which is paramount in recommending any alternative option that may be available to you. This process is our expertise, and can be completed in a timely manner.

The process of developing your estate plan is customized, tailored to your unique individual and family needs. It is also comprehensive, however; it does take time to fully implement. At R.E.A.P., it is important that you participate throughout this process, for you are the most integral part of this process.

Development of your estate plan is done in multiple stages, with attention to detail being a top priority. This process includes:

I. Review Current Estate Plan
II. Review Current Financial and Income Plan
III. Gather Client Family Information
IV. Consultation and Review by Attorney
V. Estate Plan Preparation
VI. Estate Plan Delivery and Implementation
VII. Filing of Deeds
VIII. Coordination and Funding of Assets
IX. Income Planning
X. Financial & Investment Advisory Services

Once this process has been completed, you and your family will possess a powerful, customized plan. It is tailored to meet your current estate planning needs, yet also is able to meet any needs that may arise in the future.

If you or your family have questions at anytime during the process, please call us at (386)793-8981 or (352)-433-6565.

Thank You!

David H. Morgan
M.S.F.S., CEP, CEA
Registered Investment Advisor