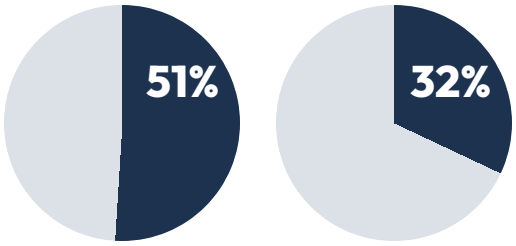
Wealth Builders
Insurance Agency

ESTATE PLANNING

Decide now, so your family never has to guess.



2005
Gallup

2025
Pew Research Center

Fewer adults have a will today than twenty years ago.

Adults in the United States who said they had a will.

Three ways what you leave gets passed on

NO PLAN
State law decides who receives what, and a probate court oversees it. That can take months and cost the family money.

A WILL
You decide who receives what. The will still goes through probate court, and it becomes a public record.

A TRUST
What you place in the trust passes without probate court. Your family moves sooner, and the details stay private.

Life insurance already skips probate: it pays the people you named on the policy. Your plan covers everything else, like the house, the accounts, the children and your health care.

What a complete plan decides

Who gets what
The people and causes you want to receive what you leave.

How and when
A share can wait until an age you choose, like 25 instead of 18.

Who raises your children
The guardian you trust, named in writing.

Who handles money
The person who manages things if you cannot, and after you pass.

Who speaks for your health
Medical decisions and records, in the hands you choose.

Start with a free conversation.

Call or text (980) 304-1500
wealthbuilders-insurance.com/go/estate

Chaka A. I. Ali, Licensed Managing Financial Strategist **Call or text (980) 304-1500** **wealthbuilders-insurance.com**

We are not a law firm and do not give legal advice. Your documents are customized to you and reviewed by certified estate planners and paralegals. An attorney review is available in most states.

Wealth Builders Insurance Agency

ESTATE PLANNING

We are the bridge, not the attorneys.

We streamline the process for both sides. We gather your information with you and walk you through each choice, so the attorneys and the rest of the team can review it quickly, and every plan has a human review. Every plan is real and customized to you and your family, without the direct cost of attorneys and on your own timeline. You keep more control of the process, without the hassle.

How we walk you through it

1 A free conversation
About your family. We help you see whether a will or a trust fits, and show you the price sheet.

2 Your planning agreement
You sign it online. It lists your flat fee: your package plus any add-ons you chose. Nothing is hidden.

3 Your questionnaire
A secure online questionnaire, one step at a time. Or we go through it together on a call.

4 Your plan is prepared
Customized to your family and your state, reviewed by certified estate planners and paralegals, usually within 5 business days.

5 You review your summary
We email you a summary of your plan. You confirm it, or tell us what to change.

6 You sign, and we finish
You sign your documents, and we help move what belongs into your trust.

Your information travels over an encrypted connection and is shared only with the team preparing your documents.

Two packages

Trust-Based Package

What you put in the trust passes to your family without probate court, and your plan stays private.

$1,775 single · $2,775 joint

Will-Based Package

The essentials: who gets what, who raises your children, and who speaks for you if you cannot.

$875 single · $1,750 joint

Joint means a married couple or domestic partners. Every document in each package is on the package sheet.

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