



Estate Plan Comparison Chart

The chart below reviews critical features associated with each plan type.
*indicates a plan we offer.

	Intestate	Beneficiary Designations Only	*Powers Package	Testamentary Trust	*Will Based Estate Plan	*Trust Based Estate Plan
Avoid Probate and Court Forms						✓
Beneficiary Designations		✓		✓	✓	✓
Health Care Directives and Power of Attorney			✓		✓	✓
Appoint Fiduciary Immediately						✓
Appoint Guardians					✓	✓
Age Based Restrictions						✓
Works During Incapacity			✓		✓	✓
Special Needs						✓
Easily Revised			✓		✓	✓
Asset Protection after Death						✓
Private			✓			✓