



# The eStatePlan™

– Featuring the Benefits of Nevada Law –

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Integrated Trust Systems

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## 1) A Revolutionary Auto-Processing System –

▶ The dynamics of **The eStatePlan™** processing platform are made possible through bundled software applications that auto-merge both field and custom text entries unto certain software-selected document templates. The templated documents can be further tailored with data-entry-driven *replacement/removal code*. And IT IS FAST.

- The data entries for The eStatePlan creation are made ONLINE as a turn-key, client controlled (*howbeit, office-assisted*) system complete with electronic signature (ESIGN) applications to implement the Dynamic Trust Portfolio document set and the electronic Funding Kit.
- The eStatePlan's bundled platform applications empower the client/user within a secure environment to generate a personalized, fully-funded and properly implemented Revocable Living Trust estate plan *in about an hour!*
- The eStatePlan system also provides comprehensive “Custom Trust Directives” that can be imported by the user, and/or the assisting attorney-of-record, through the ONLINE Data Entry page. The result is a customized, Revocable Living Trust Estate Planning document set electronically generated when the Data Entry page is submitted, which can be modified within the Client Console.

▶ The eStatePlan user dynamics and benefits are available only through a password protected, subscription-based Client Console. The Console serves as the dashboard tool that enables The eStatePlan user to electronically implement, manage, store, and modify (without limitation) his estate plan in a web-based, secure cloud environment.

▶ The eStatePlan Client Console also features a “Share Console” functionality where the user can “share” any selected portion of the data in the Client Console to anyone including his legal counsel through an ancillary, password protected code. This allows the user’s legal counsel (personal attorney) to review the user’s data and trust draft, and make any changes that counsel deems necessary to obtain the estate planning goals of the client/user.

▶ The eStatePlan processing system equips client/purchasers to not only electronically create but also to *modify without limitation (24/7)* their personalized estate planning packages in a secure, user-friendly environment – The eStatePlan Client Console – if the user opts for and maintains the My LifeCard Plan (MLCP) Membership Subscription beyond the 90-day, provisional term.

## 2) Secure Access Portal for Client/Members –

- ▶ Full 90-day access to the Client Console is initially provided for all patrons through eStatePlan's FREE (My LifeCard Plan) Provisional Membership, which is always included with The eStatePlan purchase.
- ▶ The Client Console features powerful dynamics that enable users to modify (24/7) their Dynamic Trust Portfolio documents, Funding Kit ledgers, Advanced Medical Directives, PostScript Page, and E-vault Center portals.
- ▶ Membership access to the Client Console beyond the FREE 90-day Provisional term requires a one-year renewable subscription (required for the first-time membership opt-in) payable with the user's choice of either monthly or annual recurring billing.
- ▶ The MLCP Membership Subscription, while not required for the client/purchaser, is a vital component of the system. There are several benefits and dynamic features available to Member subscribers through their Client Consoles including:
  - **Document Modification Functionality** – allows client/users to modify their Dynamic Trust Portfolio *at any time and as many times* as may be necessary to maintain the updates associated with family planning conditions, goals and objectives that can frequently change.
  - **Electronic Trust-Funding Applications** – enables client/users to fund their trusts electronically by listing personal assets, including personal real estate interests, onto "Assignment Ledgers" that can be modified anytime as needed.
  - **NotePad Center** – provides a method for client/users to instantly communicate with all service parties concerning questions and/or obtaining professional assistance while having such digital exchanges permanently recorded and filed.
  - **Advanced Medical Directives (AMD)** – presents a comprehensive health care directive document that can be filled out ONLINE, electronically signed, and modified at any time later.
  - **Emergency Online Medical Access** – grants an attending physician or other health care provider immediate access to the AMD through the Physician Login Page using only the subscriber's Membership Card ID number.
  - **Share Console** – provides select-limited access of the Client Console for the subscriber's (outside) legal counsel, tax advisor, other service providers, to view entered data, personal documents and other information.

- **Postscript Page** – presents entry fields to log wishes, family and/or personal references and directives, and provides a place to record password information under the *Revised Uniform Fiduciary Access to Digital Assets Act (RUFADAA)*.
- **E-Vault Center** – provides a secure storage venue for various digital documents and important records and/or other items such as digitized photos.

### 3) The eStatePlan's Electronic Signature Technology –

▶ The eStatePlan system provides electronic signature applications in compliance with the “**Electronic Signatures in Global and National Commerce Act**” (**ESIGN**) and Nevada law under [NRS Title 59, Chapter 719](#). Among other features, ESIGN technology records an *electronic effective date* for the living trust and all other ancillary trust-portfolio documents.

- The Electronic Effective Date (EED) application enables user/grantors to electronically modify their own document sets at any time and as many times as desired *without* having to use amendments or restatements of trust.
- The integration of proprietary ESIGN & EED technology with The eStatePlan’s complete *no-limit-to-modifications* service platform enables users to confidently address the (otherwise difficult) inevitable duties associated with personal estate plan maintenance.

▶ The ESIGN design also allows users to remove the recorded “ESIGN date” if that were ever to become necessary, enabling the user/grantor to simply start over again and recreate a new effective date for the RLT.

### 4) Electronic Funding & Digital Implementation –

▶ The eStatePlan's electronic signature technology also enhances the user's trust funding experience with the platform's Funding Kit. The Funding Kit serves an important segment since proper funding – *an often incomplete, but quite necessary, implementation activity* – is essential to realize a fully completed plan.

▶ The eStatePlan's cloud-based funding process has, in fact, revolutionized the way living trusts can be funded through the speed, efficiency, and convenience of electronically implemented asset-transfer ledgers, which circumvents the otherwise time consuming (and neglected), asset-remainderment-to-trustee process.

▶ The Funding Kit's ESIGN system helps facilitate the user when redirecting beneficiary designations of an IRA, life insurance policies and other POD type accounts.

- The bundling of Funding Kit applications with ESIGN technology enables eStatePlan end users to generate a properly implemented, fully funded, and effective-date-established living trust estate plan *in about 90 minutes!*
- The Funding Kit is easy to use for recording data on a multi-page HTML Asset-Transfer Ledger where additions/deletions are made by keystroke entries.

#### **5) Trustee/Executor Login Access –**

▶ With The eStatePlan process, the (corporate) successor trustee's time-consuming and often difficult process of gathering and retrieving client information relative to the client's estate plan is a thing of the past. All such information will be stored in The eStatePlan cloud and available for easy access to the corporate trustee through the Trustee/Executor Login portal.

▶ To facilitate the duties of performing trust administrative services, including future estate settlement activities, the selected corporate trustee will have seamless, cloud-based access to ALL of the clients' documents (to view/print only), implementation dates, and other trust asset information regardless of how many times it has been changed and updated by the client. *(ONLY the "view/print" component is available to the Trustee/Executor inside the Client Console.)*

#### **6) Seamless Platform Integration for All Parties –**

▶ The eStatePlan platform supports and facilitates inter-connectivity between all the parties, who are: (i) the client/grantor; (ii) the Client Management Services (CMS) office; (iii) the client's investment advisor of record; (iv) the client's attorney of record; and (v) the client's appointed successor (corporate) trustee.

▶ The NotePad Message Center makes it easy for the parties to communicate with one another directly through the processing platform. And, as with all other client-based information, the communication records are permanently stored in The eStatePlan cloud-based server and back-up files.