



FAMILY
ESTATE
PLANNING
LAW GROUP

SAVeT SystemTM

Simplify/Consolidate

The key to SAvET: simplification. Consolidate your assets before your asset alignment meeting.

Less assets = decreased chance of probate, and a more efficient estate plan

Align

Align your assets with your estate plan.

This includes beneficiary designations, Power of Attorney, etc.

Verify

Verify alignment with institutions to prevent any surprises.

Track

Continually track your assets to make sure alignment and verification stay current, because laws change, institutions change their regulations, and you may have changes in your life.

Together, We Plan for Life.[®]