365 Estate Plan™

Achieve Your Goals *Realize Your Dreams* *Provide for Your Legacy*

Estate Planning for Peace of Mind

Defining your legacy and providing for your spouse and family requires thoughtful consideration and planning. Today's families can include several generations, each having different goals and priorities along with needs and wants.

A well-structured Estate Plan should reflect your intentions and fulfill your wishes. Planning will require that you spend time refining your intentions and deciding who will benefit. When done correctly, your estate plan will reflect your goals and objectives and take into consideration special circumstances, while protecting your hard-earned assets, minimizing long-term costs and avoiding unnecessary taxes.

Ensuring comprehensive wealth transfer is complicated and often requires choices and decisions about very personal issues. By establishing an Estate Plan, you will have peace of mind today that your legacy and your family are protected tomorrow.

Professional Support

It is important that everyone makes their wishes known. Equally important is that your intentions are effectively documented. That means doing the proper estate, income and gift tax planning along with addressing special interests, such as collections and rare assets and completing the proper documentation.

Anthony J. Madonia & Associates, Ltd.

Anthony J. Madonia & Associates, Ltd. has been providing Estate Planning and Tax support for over 20 years. Every client is unique and requires a personalized approach. From individuals and couples to privately-held businesses and the families they support, clients have come to rely on our professional and technical skills as well as our personal life experience insights.

Providing the Right Direction™

Anthony J. Madonia & Associates, Ltd.

Legal. Business. Tax. Estate. Planning.

233 S. Wacker Drive, Suite 6825, Chicago, IL 60606

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Our goal is simple: Providing the Right Direction to insure that your family legacy is preserved.

365 Estate Plan™

I. Review
   Introductory Call
   Information Gathering
   Evaluation of Estate, Business or Both

II. Design
   Initial Client Visit
   Collaboration with Outside Advisors
   Initial Design, Team Review and Collaboration, Plan Revision
   Client Meeting and Feedback
   Final Advisory Team Design Update and Review

III. Implementation
   Client Meeting and Signing Ceremony

365 Estate Plan Review™

Annual Review, Maintenance and Update to Estate and Business Plans to Respond to Life's Changes

I. Annual Estate Plan & Trust Funding Review

II. Annual Meeting

III. Unlimited Phone Call & Email Access

IV. DocuBank Service

V. Outreach and Coordination with Other Advisors

VI. Estate Plan Transition Explanation

VII. Client Forum

Estate & Wealth Preservation Planning

- Personal Protection
- Asset Protection
- Powers Documentation
  - Attorney, Health Care Powers, Guardianship, Property Titles, Creditor Protection, HIPAA Disclosures
- Family Control and Shareholder Agreements
- Stock Options
- Insurance Review
- Retirement Assets
- Gift and Estate Tax Exemptions
- Trusts and Wills
  - Living, Revocable and Irrevocable, Disability and Incapacity, Education, Gifting, Incentive, Surviving Spouse, Divorce, Generation Skipping
  - Grantor Deemed Owner, Split Interest Trusts, Installment Notes, Wealth Replacement, Insurance, Offshore

Generational Asset Protection Planning

- Special Needs
- Education
- Gifting
- Retirement

Elder Law Planning

- Disability and Long Term Care Requirements
- Veteran's Benefits

Gift & Philanthropic Planning

- Private Foundations
- Lifetime Gifting
- Charitable Trusts

Linked in

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