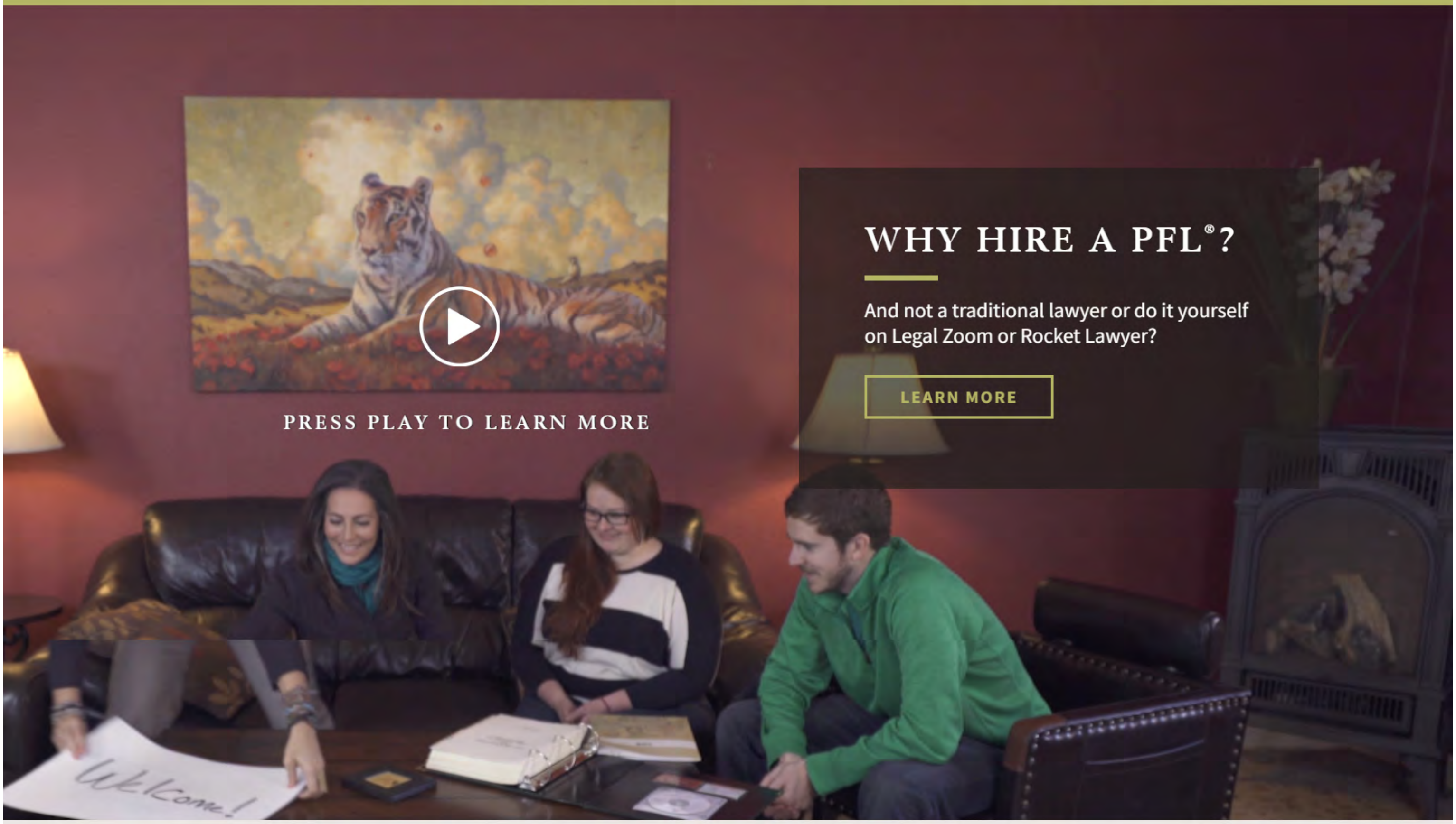

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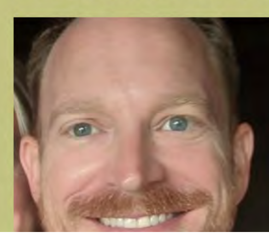

BRET CHRISTIANSEN

Bret was born in Great Bend, Kansas as the youngest of three children. His father's career in various agricultural cooperative systems took him from Great Bend to Gering, Nebraska, and then to Hiawatha, Kansas, where Bret graduated high school. After graduating high school, Bret attended Kansas State University in Manhattan, Kansas where he earned his Bachelor's Degree before heading to California Western School of Law in San Diego, California. In 2010, Bret obtained his J.D. and graduated with Honors from the "Center for Creative Problem Solving," an academic area of concentration that focuses on acquiring the skills necessary to demand a broader and deeper understanding of people, their specific problems, and the consequences of confronting those problems only in narrow, legalistic ways. Through this curriculum, Bret obtained practical training on how to think more broadly, flexibly, relationally, and preventively when dealing with complex legal matters. He passed the California Bar Exam in 2010 (#272045) and the Kansas Bar Exam in 2011 (#24835). Before starting Succession +, Bret spent five years working in law firm settings and an additional two years in a trust department as a Vice President. He lives in McPherson, Kansas with his wife, Jackie, and their three beautiful children Gentri, Hattie, and Bodie.

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WHAT IS A PERSONAL FAMILY LAWYER®?

A Personal Family Lawyer® is a trusted advisor who helps you make the very best personal, financial, legal, and business decisions for your family throughout your lifetime and is there to guide your loved ones when you can't be.

Back in the day, before lawyers became all about form documents and transaction, **mom and pop turned to the trusted family lawyer for guidance throughout life's ups and downs**.

As as law firms grew and became more focused on billable hours and profit centers, the personal relationship began to fall by the wayside.

And, in the early 90s, planning with living trusts became so popular that every lawyer and his brother decided to start dabbling in Wills and Trusts and the **practice soon became about impersonal fill-in-the-blank-form documents**.

Most recently, with the rise of online document drafting services, like RocketLawyer® and LegalZoom®, the forms and documents nature of Wills and Trusts has become even more common.

The trouble is that whether these documents are prepared by a traditional lawyer, or you do it yourself on one of these online document drafting websites, these **documents often don't keep your family out of court or out of conflict** when you or your family member becomes incapacitated or dies.

Why Your Will or Trust is Likely to Fail When You Don't Use a Personal Family Lawyer® to Prepare Your Family's Estate Plan …

When you create an estate plan using documents only, like those you often see online advertising a complete estate plan for $399, or when you do it yourself, or use a documents-focused lawyer, you often aren't making the best choices for your family.

These are one-size fits all, document-only plans that do not ensure your assets are able to be located upon your incapacity or death, do not plan for your minor children properly and do not focus on the most often lost intangible assets you own, which are often worth far more than your financial assets. Unfortunately, the people who bear the brunt of your poor decisions are the people you love most.

For example, when I (Ali) was in law school, my father-in-law died. He had spent $3,000 on an estate plan with a law firm in Florida, specifically to keep us (his family) from having to deal with the Court or his ex-wife, after he died.

You can imagine my surprise then when after his death we were stuck in Court, dealing with his ex-wife!

I thought for sure this firm must have committed malpractice. However, after graduating and going to work for one of the best law firms in the country, I found out that it was not malpractice at all. Most lawyers, including those at the AMLaw Rated #1 firm I worked at, commonly put documents in place for clients, without ensuring the plans actually provide the protections clients seek.

My father-in-law's plan was never kept up to date as his life, the law, and his assets changed.

His assets were not titled properly. And this is all too common with most estate plans created by traditional lawyers. The plan had not been drafted properly to exclude his ex-wife from any standing.

You see, my father-in-law had paid $3,000 for a one-size fits all plan that he thought took care of everything, but it didn't. And he died not knowing that his loved ones would be the ones stuck dealing with it.

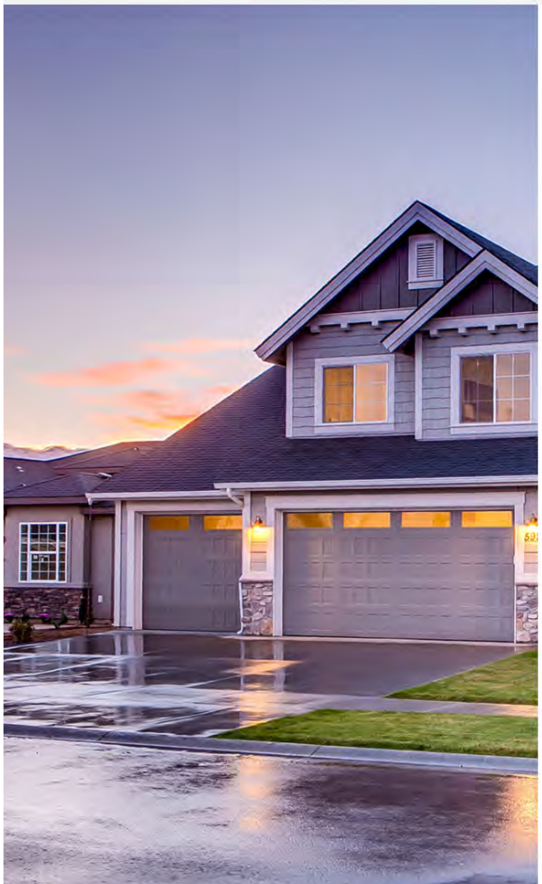
It's an all too common problem.

Consider this **common experience** - you'll go in and meet with a lawyer who will prepare standard form documents for you and you'll sign the documents, feeling relieved that you've taken care of such important matters.

You'll take your fancy planning binder home, **stick it on a shelf or in a drawer**, mark estate planning "DONE" on your checklist, and **never think about it again**.

You might remember your lawyer said something about moving your bank accounts into the trust. So you'll go to the bank, forget what you were supposed to do, call your lawyer's office, get a voicemail, have to leave the bank and wait for a call back, (which takes several hours at least and sometimes days) and by that time, you'll have gotten busy with other things and **never get around to moving that bank account**.

A few weeks later, you'll **get a bill in the mail for $67.50 for 15 minutes** of your lawyer's time for answering a couple of questions. You'll make a mental note – don't call the lawyer ever again.



Several years later...

...**you'll refinance your house or sell it** and buy a new one and forget that you were supposed to let your lawyer know or make sure you kept the title in the name of the trust.

Your **children will get older**, making your guardianship choices outdated, but you don't want to call your lawyer because you know you'll get a bill in the mail two weeks later.

You'll **hear something about a change in the tax law**, but you figure you'd surely get a letter in the mail from your lawyer if it was something that affected you, so you don't worry about it. And, you'd have to dig through boxes to find your trust documents so you could remember your lawyer's name and find her contact information.

Who has time for that?

It's not until you become incapacitated or die and your family finds the binder you stuck up on a shelf several years before and never looked at again, that **they'll realize your plan is so outdated** that it has nothing to do with your life, your assets, or the law.

Your family is at a loss. They don't know where to turn or what to do, so they contact the same lawyer you used to prepare the documents, who is as happy as can be to probate your assets, which never made it into the trust.

How do I know all this?

Because as you heard earlier, **it happened to my family** when I was in law school and **I swore it would never happen to my clients** when I became a lawyer.

And then, I spent three years in a big law firm where I saw how easily it could happen - and I worked for one of the best law firms in town - a law firm that followed the best practices in the industry.

Unfortunately, what **I discovered is the estate planning industry was not designed to serve growing families who experience lots of change on their way to success**.

It was designed to serve 70 and 80 year olds who were preparing for death.

YOUR PERSONAL FAMILY LAWYER®
HELPS YOU PREPARE FOR LIFE

What makes a Personal Family Lawyer® different is that we have the needs of growing families in mind.

We understand **you are BUSY**, you are **growing**, you are **planning for a life of prosperity,** and you **value ease, convenience, and efficiency**.

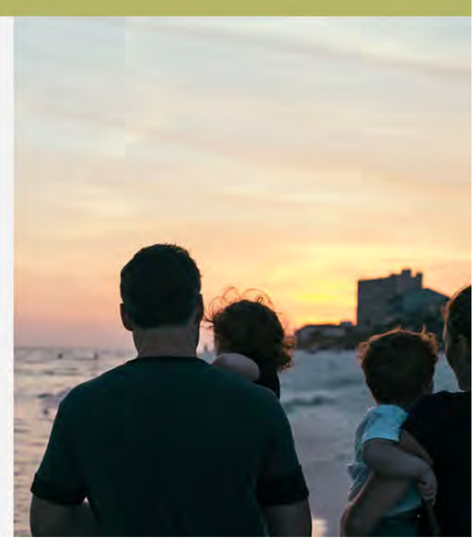
You want to **know you've made the best decisions** for your family and **that your plan will work** when your loved ones need it most. You want to make sure your children will be taken care of in the best way possible and will be **prepared to receive your wealth** if anything happens to you.

That is our focus as well.

We've developed **unique systems** to give you the same **access to a personal lawyer** that was previously only available to the likes of Bill Gates, Warren Buffet, and Sam Walton so **you can have the guidance you need to build and maintain a life of prosperity and wealth**.

We **encourage communication** with our clients.

In fact, we've **thrown out the time clocks** so you never have to be afraid to call with a quick question (or even a not so quick question). Everything we do is billed on a flat-fee basis, agreed to in advance, so **there are never any surprises**.



We have a **whole team to serve you.** When you call our office to ask your quick question, you **won't have to wait hours or days for a phone call back.** You'll **get your question answered, right away**.

And, if you need to schedule a more in-depth legal or strategic call with your personal lawyer, a call will be scheduled when you're both available and ready for the call. **We'll make the very best use of your time** and won't waste your time by leaving voicemail after voicemail back and forth.

And, we ensure the most important **planning details are followed through on** and your **plan continues to work throughout your lifetime.**

If you have minor children at home, it's even better. We can just about guarantee that if you've created a plan with a traditional lawyer your minor kids are left at risk due to holes in your plan.

You can **read more about that in the best-selling book on legal planning for parents, here**. And, when you work with a Personal Family Lawyer®, we make sure your kids are taken care of, no matter what, if and when anything happens to you.

Best of all, we don't just help you to pass on your money. **Built into every single plan is a Family Wealth Legacy Interview** to ensure you capture and pass on what really matters -- your intellectual, spiritual, and human assets, your values, insights, stories, and experiences -- the things that are most often lost when someone dies.

On top of all that, we've created **unique membership programs** to **keep your plan up to date** year in and year out. You'll also get **access to our Trusted Team of Legal Experts** for guidance on ANY legal or financial matter.

One day you will need a lawyer. I don't know when and I don't know why, but when you do, you will be grateful you can call on us and we'll be here to advise you or get you out of a jam.

Lastly, we believe **your financial wealth is a small part of your overall "Family Wealth"** which is made up of your far more valuable, Intellectual, Spiritual and Human assets – **who you are and what's important to you.**

Most estate plans are only able to transfer your financial wealth to the next generation.

The intangible nature of your much greater wealth has made it difficult to capture and it is most often lost when someone passes. How much do you know about your grandparents' values? Their most prized personal possessions? How they felt about you? What lessons they learned during their lifetime?

If you are like most people, you know very little. But, **the wealthiest families capture these assets and pass them right along with their financial wealth**. And, that's part of the reason the rich keep getting richer.

We've developed a tool that allows us to **pass on your whole Family Wealth**, including your Intellectual, Spiritual and Human assets. I can't go into all of the details here, but we'll definitely talk about when you come into meet with your own Personal Family Lawyer®.

We look forward to seeing you and caring for your family soon!

Ali Katz

PS – if you think this all sounds expensive, well, you are right and you're wrong. I can guarantee you that if you qualify to meet with a Personal Family Lawyer®, that **planning is substantially less costly** than it would be for your family if you died with a plan that didn't work or if you didn't have a plan in place at all. And, I've never had a single family who believed in this kind of planning and wanted to put it in place for their loved ones leave my office because they couldn't afford it. **Personal Family Lawyers make creative financing available** to our clients because we know that this planning is the foundation for a life of success.

If you'd like to get started with a Family Wealth Planning Session that will get you clear on what will happen to everything you own and everyone you love, when something happens to you, so you can create an empowered plan for the care of your loved ones:

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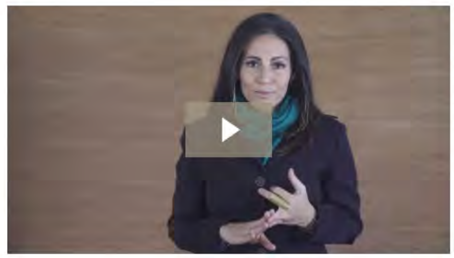
FOR LAWYERS

If you are a lawyer looking for a better way to practice law and serve families in your community, you are in the right place.



Does this sound like you?

You want to make absolutely sure you are helping the families in your community do the right thing by their loved ones, not just put in place a one-size fits all plan, that may or may not work with they need it.

You want to help families in your community be better parents and adult children, not just get a set of form estate planning documents in place.

You want to do right by parents who have minor children at home, and ensure their kids are not left at risk if anything happens to them.

You want to be a trusted advisor to the people you serve.

If you're ready to serve families in an entirely new way; one where you are the trusted legal advisor to your clients, begin here:

CLICK HERE TO BEGIN

Perhaps you are already serving clients in an effective way that truly makes a difference in your clients' lives, helping them to become better parents and citizens in their communities.

If so, we're ready to help you expand your reach. We know that the more parents you serve, the better the world will be.

Apply here to become a licensed Personal Family Lawyer®.

CLICK HERE TO SCHEDULE A CALL

If you reviewed the application and are not currently qualified because you have not fully incorporated the New Law Business Model way of practice or because you do not have the comprehensive training to serve parents in the way we teach, that's okay!

We can still help you become the lawyer you've always wanted to be. Simply let us know here that you are truly ready to become a lawyer your clients love. We'll be in touch to begin your training.

CLICK HERE TO BEGIN

A FEW OF OUR LAWYERS:

Nicole Newman

To learn how Nicole went from working at a firm where she struggled for clarity around having a structure for any consistency or time management and feeling like the consultations were just dragging on and on to embracing a practice where she gets to meet with clients who want to make a difference in the lives of their loved ones and receives so many flowers and gifts from her appreciative clients, click here...

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David Feakes

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Amie Mendoza

To learn how Amie transformed her practice from being a "door lawyer", wanting to make a difference but barely making ends meet to being able to start charging for the value she was giving to her clients, her clients loving the relationship, and being able to work just 4 days a week which allowed her to spend more time with her son, click here...

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