

PRO→TAX™

FINANCIAL SERVICES

We have provided Income Tax
Services for families for over 30 years....



NOW OFFERING LIVING TRUST SERVICES

"The Most Important Document
a Family Can Have."

Call Today for a
Free Consultation!

626.962.8900



WHAT WILL A COMPLETE PROTAX LIVING TRUST INCLUDE?

THE LIVING TRUST

POUR OVER WILL

DURABLE POWER OF ATTORNEY

DELEGATION OF BANK AUTHORITY

ADVANCED HEALTH CARE DIRECTIVE

TRUST TRANSFER DEED

FULL RECORDING WITH THE COUNTY
RECORDER



COMPLETE NOTARIZATION SERVICE

PROTAX will provide the most important parts after your trust is completed. This includes "funding the trust," where we record the property transfer. And the Notary Signature, which certifies that your trust is a valid and official document.

BENEFITS OF A LIVING TRUST

- A living trust is your voice.
- AVOID PROBATE -A living trust helps avoid the costly delays of probate by skipping the process entirely. Creating a living trust is an excellent way to ensure a quick, smooth transition of your property to your beneficiaries.
- The tax benefits for your family, that a trust document can provide.
- Save your loved one's time, money, and hassle by allowing them to receive their inheritance faster.
- Leaving property and assets to a family has the potential to create conflict. A living trust will lay out a simple and easy plan for your loved ones to follow. The trust acts as your voice when the time is necessary.
- Pass on your property the way you intend it to and with any specifications that you require.
- You can change your living trust at any time during your lifetime. You have complete control and flexibility.

**Call Today for a
Free Consultation!**

626.962.8900



FACTS YOU SHOULD KNOW ABOUT

- **What if I do nothing?**

The property and all your property will be held in what is known as intestate. The State of California will apply a probate process. This is a court-supervised process of distributing your estate after you pass away. During probate, the court will distribute your assets in accordance with California's intestate succession law. The outcome can result in a distribution that is not what you intended and hoped for. A living trust will prevent this from happening because you will already have designated beneficiaries and a successor trustee, all in a clear and strong legal document that will be your living trust.

- **What if I already have a will?**

A will still has to go through the California probate process. A will only serves as instructions to the probate court. There, all your assets will become public record, and anyone may make a claim against your estate or contest your will. The cost of probate can end up taking up to 15% of your assets.

- **What will a living trust do for me?**

Your trust will state how you want your assets to be distributed and who you want them to be distributed to. It will allow your loved ones to avoid probate and receive the tax benefits of a living trust. It will allow you to have control over your assets during your lifetime, in a clear and thorough document. The living trust will act as your voice when the time is necessary, and it will prevent your family from having to deal with any unnecessary difficulties that you have already set forth in your living trust.

