Family Wealth Planning Session

IMPORTANT INFORMATION FOR YOUR UPCOMING APPOINTMENT

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HOW OUR LAW FIRM IS DIFFERENT

Keoni Souza, JD, MBA
Attorney and Counselor at Law

Welcome! Explaining to you how we're different requires an explanation of what the "traditional" experience with a lawyer is like. If you've worked with a lawyer to prepare estate planning documents for you in the past, this will sound familiar.

During the traditional experience, you will go in and meet with a lawyer who will make things seem very complicated and confusing. You will have a good idea that the lawyer is smart and seems to know what he or she is doing, so you will nod and answer questions, as if you understand everything. Because you want to do the right thing for your family, you'll have the lawyer prepare documents for you and you'll sign the documents, feeling relieved that you've got that taken care of.

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

You might remember your lawyer said something about moving your bank accounts into your trust. So you will call your lawyer's office. A few weeks later, you will get a bill in the mail for $67.50 for 15 minutes of your lawyer's time for answering a couple of questions. You will make a mental note — don't call lawyer ever again.

Several years later, you'll refinance your house or sell it and buy a new one and forget to make sure to keep 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 Your children will get older, making your guardianship choices outdated, but you don't want to call your lawyer because you know you'll get a bill in the mail.

You'll hear something about a change in the tax law, but you figure you'd surely get some kind of correspondence 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 his or 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the binder you stuck up on a shelf several years before and never looked at again, that they'll realize your plan is so outdated that it has nothing to do with your life, your assets, and the law.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 earn more money to probate your assets, which never made it into the trust.

HOW DO I KNOW THIS?

I know this because I've seen this happen too many times to too many families.

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 the elderly who were preparing for death.

OUR FIRM HELPS YOU PREPARE FOR LIFE

What makes our firm different is that we are here not just to create a set of documents you will likely never update or look at again.

We are here to ensure your loved ones have someone to turn to when you are no longer here. And, to support you in planning for not just legacy (what you leave behind when you are gone), but for life as well.

We've been told by many of our clients that the experience of considering their own death before and during their Family Wealth Planning Session, in the way we take you through the experience, offers a deeper and better experience of life afterwards.

We understand you are BUSY, you are growing, you desire a life of prosperity and you value ease, convenience, and efficiency. You want to know you've made the best decisions for your family during your lifetime and that your family will be left with ease while being aware of your love by how well you prepared.

You want to make sure your children would be taken care of in the best way possible and will be properly prepared to receive your wealth, when it is time.

That's our focus too.

We've developed unique systems to give you the same access to an estate planning lawyer as 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 leave a legacy of Family Wealth.

Family Wealth is so much more than financial wealth. It really encompasses everything you care about even more than money, your values, insights, stories, experience — your intellectual, spiritual and human assets.

As part of our planning process, we guide you to consider and plan for those most often lost assets. It's baked in.

We encourage communication with our clients. In fact, we've thrown out the time clocks so you never have to be afraid to contact us 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.

Also, we ensure the most important details of your planning are followed through on and help you make sure your plan continues to work throughout your lifetime.

We've even created unique membership programs to keep your plan up to date year in and year out.

We believe your financial wealth is only 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 is important to you.

Most lawyers only focus on transferring your financial wealth to the next generation; we focus on identifying and building your Family Wealth during your lifetime and leaving a legacy of love that goes far beyond money, after you are gone.

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 the details here, but we'll definitely talk about it when you meet with me.

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

Keoni

Keoni Souza

PS – If you think this all sounds expensive, well, you are right and you are wrong. The Family Wealth Planning Session is worth its weight in gold because you will immediately feel clearer than you ever have before about what you really need and what you don't really need when it comes to the lifelong well-being and care of your family. And, you will only choose to invest in work beyond the Planning Session if doing so would save your family more money in the long run than it would cost to create a comprehensive plan.

WHAT TO EXPECT DURING YOUR FAMILY WEALTH PLANNING SESSION

We have blocked two hours off on our calendar for your Planning Session. Please plan for the full two hours so that you can get the most out of your Family Wealth Planning Session. If this will not be possible during the time you scheduled, please contact us so we can reschedule.

I will expect to meet with you and with anyone else you will be planning with such as your spouse or life partner. Please ensure all parties will be available during the meeting time so that you can make the most of your Planning Session.

Your meeting will begin with me sharing some of my background and history. We'll then walk through "what would happen" if something were to happen to you now. You'll let me know if "what would happen" is okay with you or not. If it's not, I will help you design a plan to ensure your family will have as little to worry about as possible if something happens to you.

If, after reading "How Our Law Firm Is Different," you discover you are looking for a document preparation lawyer rather than a lawyer who provides a lifetime of guidance, protection and care, helps to ensure your plan will work at the time of your death or incapacity, and guides you and your family throughout your lifetime, please let me know right away so I can take your appointment off our calendar and refer you to a lawyer who operates on a more one-off transactional basis.

If, after reading "How Our Law Firm Is Different," you are ready to consider the nature of your Family Wealth and the best way to build it during your lifetime and leave it behind when you are gone, please continue to read "How to Prepare for Your Family Wealth Planning Session."

HOW TO PREPARE FOR YOUR FAMILY WEALTH PLANNING SESSION

You will get the most out of your personal Family Wealth Planning Session if you are prepared.

First, you will want to complete your online Family Wealth Inventory & Assessment. Complete the worksheet as best as you can. Don't worry if you don't know all the details we've asked for. It's a great starting point for you to get your affairs organized. The planning process is extremely helpful in that regard. We are going to make organization even easier for you after you meet with us. Please return your worksheet at least three days before your scheduled meeting so I will have an opportunity to thoroughly review your worksheet and will be ready to advise you when we meet.

Next, you will want to begin gathering bank account statements, brokerage statements, property deeds, life insurance information, corporate records books (if you are a business owner), and retirement plan statements. Don't worry if you can't find everything. Again, this is just a starting point.

Now would also be a good time to request beneficiary designation change forms from your insurance company, retirement account custodians, or from your HR department if you have work-related benefits. While you won't need those right away, you will need them eventually and starting now can't hurt.

YOU MIGHT NOT WANT TO KEEP YOUR APPOINTMENT IF ...

YOU THINK YOU ALREADY HAVE AN ESTATE PLAN IN PLACE

If you already have a Will, Trust, Health Care Directive and/or a Power of Attorney in place, you may think you don't need to come in for your Family Wealth Planning Session.

Here's why you do.

Estate planning documents by themselves are meaningless to your family if they are not kept up to date throughout your lifetime and if your assets are not owned in the right way to keep your family out of Court and out of conflict, when something happens to you.

If there have been any changes in your life, the law, or your assets since you put in place those documents and the documents have not been updated, meet with us so we can make sure your plan still serves you and your family.

And, if you have minor children at home, there is a very good chance that the documents were not prepared properly in the first place. That means your children could be at risk of being in the care of someone you would not want. Sadly, most lawyers simply do not have the knowledge, training, or experience to plan properly for the care of minor children.

Not to worry though, we'll discuss how to fix that when we meet.

YOU MAY THINK YOU DO NOT HAVE ENOUGH ASSETS

You may be thinking you do not have any Family Wealth to plan for or that you don't have an estate, so why consider investing time and energy to plan for and protect what you don’t have.

In reality, you DO have Family Wealth, no matter how much or how little financial wealth you have.

Family Wealth goes far beyond your money.

It covers everything you create in your life and pass on when you are gone. No matter what, your family will have to make hard decisions, pay your bills, get access to your home, vehicle, and social media accounts, when something happens to you.

This can be easy for them during a time of extreme grief or hard. What you do now is what determines how hard or how easeful it will be.

And, if you have dependent children at home, planning is a must.

You would never think of leaving your young kids or teens at home for an extended period with the one person you would never want, so why would you leave that to chance for a substantial part of their lives, if something happens to you.

The Family Wealth Planning Session you have scheduled with us is designed to take an honest look at what you really do need in place to provide for the well-being and care and ease of the people you love the most.

If it turns out you don't need any planning at all beyond the Session, you leave the Session educated, informed, and feeling great that you have done the right thing by your family by investigating what's necessary to make things as easy as possible for them at the end of your life.

Plus, most people who meet with us say that they’ve never felt more organized or at ease about their financial life than after experiencing the Family Wealth Planning process.

If it turns out you do need legal work beyond the Planning Session, we will work together to determine what's right for you and your family based on your needs, your budget, and your stage of life. And most importantly, we will make sure that whatever gets put in place will stay up to date and continue to work throughout your lifetime.

YOU THINK YOU CAN'T AFFORD TO PLAN

The last reason you may not want to keep your appointment is that you may think you cannot afford to plan.

That may or may not be true.

But you don't have to worry about that yet because when we meet we are first going to look at whether you need to plan.

If it turns out you do need to plan, we will work together to make it affordable for you and your family.

If you do not need to plan, you leave the meeting feeling great about having done everything you can to make sure things will be as easy as possible for your loved ones if and when something happens to you. So, rest easy, don't worry about a thing.

I am here to make this whole process of thinking about difficult subjects easier for you and your family. I look forward to meeting with you for your Family Wealth Planning Session. Please remember to complete your Family Wealth Inventory & Assessment and return it to us at least three days before your Family Wealth Planning Session so we can make the very most of our time together.

AGENDA FOR THE FAMILY WEALTH PLANNING SESSION

1. Introductions. My story. Firm philosophies.

2. Your story. Information gathering for:
   a. Identifying your hopes, fears, values, aspirations, goals, and objectives;
   b. Preparing and prioritizing the list of your goals and objectives.

3. Analysis of your present plan.

4. Discussion of whether I can help you meet your goals and objectives and whether there is a fit between you and our firm.
   a. If we both feel there is a fit, we will identify which of the levels of planning would be right for you. The fee range will be quoted at this time.
   b. If we feel there is not a fit, I can make a referral to someone who can meet your goals and objectives.

5) Choose one of our three levels of planning and fee.

6) Design your plan to meet your goals and objectives. This stage may carry over into a subsequent meeting depending on the level of planning and time constraints.

7) Schedule your next appointment either 4 weeks later for a plan review meeting or within 2 weeks if an additional design meeting is needed.

8) Sign engagement letter and submit first payment.

Family Wealth Plans

Our thoughtful estate planning packages provide varying levels of protection suited to your unique needs and goals. Plans range from $3,500 to $8,000 with most families falling in the $3,500 to $5,000 range.

LEVEL ONE **FAMILY PLAN**	LEVEL TWO **TRUST PLAN**	LEVEL THREE **WEALTH PLAN**
For The Family Who ...	For The Family Who ...	For The Family Who ...
Doesn’t have assets that would go through the Court process called probate upon death, but wants to guarantee their minor children are well cared for no matter what, their health care wishes are turned into directives and their loved ones are able to access their assets using a durable power of attorney if they become incapacitated. Keeps family out of conflict.	Wants the total assurance and peace of mind of knowing their family would stay out of Court and out of conflict in the event of client's death or incapacity. Also, wants to ensure assets will be transferred to heirs with the most ease and convenience possible in private and without court involvement. Client may also opt to protect beneficiary’s inheritance from lawsuits, divorces, and creditors.	Wants the total assurance and peace of mind of the Trust Plan AND all of the comfort of knowing that asset transfers have been completed with our assistance, so nothing is left out or lost because you got too busy. This plan is suited for busy families who want the least amount of personal effort and the greatest amount of convenience and care.
Your Family Plan ...	Your Trust Plan ...	Your Wealth Plan ...
Includes your Will, Health Care Directives & Powers of Attorney so you know that you are well taken care of if anything happens. Also includes a Kids Protection Plan®, if you have minor children, to ensure your children are always raised by the people you want, in the way you want, and never placed in the care of strangers or other undesirable people if something were to happen to you in an emergency situation. May include post-death trust planning to protect assets for the people you love.	Provides peace of mind of knowing we are here to guide you during life and care for your family when you are gone. The Trust Plan keeps your loved ones out of Court and all of your affairs totally private. All asset transfers will be handled by you, with guidance and support from us. A Kids Protection Plan® will be included if you have minor children.	Includes all components of the Trust Plan PLUS we analyze how each of your assets are titled and assist with all asset transfers to ensure your plan works for your family. We prepare a Family Wealth Inventory, assist in completing all bank, brokerage, insurance, and retirement account documents to transfer title and change beneficiaries to the extent allowable by individual institutions and law.

ATTORNEY BIO

Imagine having true peace of mind knowing that your loved ones are protected, your assets are secure, and your wishes will be carried out exactly as you intended. This is exactly what I offer. Unlike online self-help sites or cut-rate lawyers who only focus on documents, I provide a comprehensive service that ensures your plan will work when you need it to, and your loved ones will stay out of court and out of conflict when something happens to you.

My passion for estate planning stems from personal experience. After my mom became suddenly incapacitated without a plan, my family endured years of stress, expense, and heartache that could have been avoided with proper planning. I don't want anyone else to suffer the same fate, which is why I founded my own firm and dedicated myself to helping families that are still growing and striving for success.

I know that many families put off planning until it's too late -- just like my mom, so I've made my services as convenient and easy as possible. With online meetings, you can plan from the comfort of your own home, without the hassle of traveling to my office.

My dedication to providing the best possible service is reflected in my 5-star client satisfaction rating on both Google and Facebook. My clients appreciate the comprehensive, convenient, and personalized service that I offer.

As a Hawaii native, I bring a unique perspective to estate planning that is grounded in the local community. After graduating from the University of Hawai`i, I earned a Juris Doctor (J.D.) and Master of Business Administration (M.B.A.) from the University of San Francisco before returning home. With experience as an attorney in both the government and private sectors, I have appeared before various judges in Hawaii's Circuit Courts, giving me the skills and expertise needed to provide effective solutions.

So, whether you're just starting out in life or planning for your golden years, I am here to help. Let me give you the peace of mind that comes from knowing that your loved ones will be taken care of, no matter what the future holds.

OFFICE LOCATION

Most of our meetings are conducted online for your convenience.

However, if you have arranged for an in-person meeting at our office, we are located at Century Square at 1188 Bishop Street in Downtown Honolulu at the corner of Beretania and Bishop streets.

We are located on the 27th floor in suite 2706.

Convenient and ample parking is located in the underground garage.

The entrance to the garage is located on Bishop Street immediately after the Century Square sign.

RAVE REVIEWS FROM JUST A FEW OF OUR THRILLED CLIENTS

Google FIVE STAR CUSTOMER RATING

facebook 5 STAR REVIEW RATING

L.W. says:
Keoni sincerely cares what he does for his clients by educating them in protecting themselves, their family and future. Most importantly, coming from a single parent of two young children, his Kids Protection Plan gives me an assurance that every aspect from protective custody to healthcare information is covered should I become incapacitated or get into an accident!

S.C. says:
I have been putting off making my plan for a few years because I couldn't find the right company that made me "feel" comfortable. Keoni's webpage appeared in my FB feed and once I listened to his story, his "why" behind going into estate planning, I knew I found the right person. He is down to earth and passionate about what he does.

E.G. says:
If you're looking to secure your family's estate, Keoni Souza is the person to contact. He is professional, efficient and offers a package that most do not. In addition to the basic estate planning, he includes a video legacy interview, hard copies, digital copies, online access to your documents and best of all a package that allows you to update your documents annually! I highly recommend Keoni Souza.

C.K. says:
It's clear that Keoni really cares about families and that's the kind of lawyer I am thankful to have supporting my family and business now and throughout the years. I highly recommend this law firm if you want the best planning for your family and business.

C.G. says:
I am deeply grateful for the Law Office of Keoni Souza. Keoni was extremely reliable, thorough, generous, clear, and supportive throughout the entire process of developing my estate plan. He offered patience and clarity and assistance that went beyond my expectations.

L.F. says:
Keoni is a very kind, humble and caring person that will help you get what you need and will go thru each stage so you understand. I highly recommend him and if any of my friends ask I will have them give him a call. Thank you Keoni for you all your help.

EVEN MORE RAVE REVIEWS

K.M. says:
Keoni went FAR ABOVE and beyond our expectations and was worth every penny we paid! He knows his stuff! ... True white-glove service all the way! You're truly in good (no great!) hands with Keoni's law office.

S.C. says:
I just completed my estate planning with Keoni and I would like to send a big Mahalo to him for such a great experience. He is down to earth and passionate about what he does. He will explain the whole process in layman's terms to ensure you understand it all.

M.R. says:
Keoni created a living trust for my parents, and he was great to work with! He answered my parents' questions patiently and answered my emails in a timely fashion. He also followed up as he worked through each step of the process. I appreciated that he checked in to make sure we were moving items along to complete the trust in a timely fashion.

K.K. says:
WE ARE SO GRATEFUL TO HAVE LEARNED OF KEONI'S FIRM! He was very professional, thorough, helpful through the entire process.

T.K. says:
Keoni was a pleasure to work with. He made this process so easy. His knowledge, expertise, patience, and understanding of Family Planning and his personal story that he shared made my decision super easy to retain him and his firm.

S.S. says:
Wow, such a heart enduring experience. I did it solo as my child father passed. He was so kind and understanding when I asked way too many questions. Thank you!! I will recommend to ALL I know! Mahalo!

We ran out of space, but you can see more of our glowing reviews on Google and Facebook. See for yourself why our clients keep coming back and recommend us to their friends and family. Don't just take our word for it, see the proof for yourself!