



# Family Wealth Planning Session



IMPORTANT INFORMATION  
FOR YOUR UPCOMING  
APPOINTMENT

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# HOW OUR LAW FIRM IS DIFFERENT



Keoni Souza, JD, MBA  
Founder, Trust & Estate  
Attorney, 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 Your children will get older, making your guardianship choices outdated, but you don't want to call your lawyer because you know you'll get a bill in the mail.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the binder you stuck up on a shelf several years before and never looked at again, that they'll realize your plan is so outdated that it has nothing to do with your life, your assets, and the law.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 Souza, JD, MBA  
*Founder, Trust & Estate Attorney,  
Counselor at Law*

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 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 your family if you become incapacitated or die with a plan that does not work or if you don't have a plan in place at all.







# 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.

# What Level of Planning is Best for You?



## Life & Legacy Plans

Our thoughtful estate planning packages provide various levels of protection, suited to your unique needs and goals.

Complimentary Triennial Plan Reviews Included

LEVEL ONE	LEVEL TWO	LEVEL THREE
FAMILY PLAN	TRUST PLAN	WEALTH PLAN
<p>For The Family Who Wants</p> <ul style="list-style-type: none"><li>• To guarantee their minor children are well cared for no matter what</li><li>• Their health care wishes turned into directives</li><li>• Their loved ones to have access to their assets if they become incapacitated</li></ul>	<p>For The Family Who Wants</p> <ul style="list-style-type: none"><li>• Total assurance and peace of mind of knowing Family Wealth will be transferred to heirs with the most ease and convenience possible in private without court involvement</li></ul> <p>Clients choosing the Trust plan may opt to protect their beneficiary's inheritance from lawsuits, ex-spouses, and estate taxes.</p>	<p>For The Family Who Wants</p> <ul style="list-style-type: none"><li>• Total assurance and peace of mind of the Trust Plan AND</li><li>• Comfort of knowing assets transfers have been taken care of by our office</li></ul> <p>This plan is perfect for busy families who want the least amount of personal effort and the greatest amount of convenience and care.</p>
<p>Outcomes:</p> <ul style="list-style-type: none"><li>• A Will, Health Care Directive, and Power of Attorney so you know that you are well taken care of if anything happens</li><li>• A Kids Protection Plan to ensure your children are always raised by the people you want, the way you want and never taken out of your home by the authorities</li></ul>	<p>Outcomes:</p> <ul style="list-style-type: none"><li>• Peace of mind knowing we are here to guide you during life and care for your family later</li><li>• Keeps loved ones and assets out of court plus all of your affairs private</li><li>• All asset transfers will be handled by you with our guidance and support.</li><li>• A Kids Protection Plan is included if you have minor children.</li></ul>	<p>Outcomes:</p> <ul style="list-style-type: none"><li>• Includes all components of the Trust Plan PLUS we analyze how each of your assets are titled and handle asset transfers for you to guarantee your plan works for your family</li><li>• We prepare a Family Wealth Inventory, complete all bank, brokerage, insurance and retirement account documents to transfer title and change beneficiaries to the extent allowable by institutions and law.</li></ul>
Will-based Plan	Client-Funded Trust Plan*	Client & Firm-Funded Trust Plan*

\*Trust funding is required for both Levels 2 and 3 and involves transferring assets to your trust, either by retitling property or updating beneficiary designations.



# ATTORNEY BIO

Imagine the peace of mind knowing that your loved ones are fully protected, your assets are secure, and your wishes will be carried out precisely as you intend — without the burden of costly legal battles or confusion. That's exactly what I offer. Unlike one-size-fits-all online sites or low-cost attorneys who only focus on documents, I provide a comprehensive, hands-on service that ensures your estate plan works when you need it most, keeping your loved ones out of court and conflict.

My passion for estate planning isn't just professional — it's personal. When my mother unexpectedly became incapacitated without a plan at the age of 52, my family endured years of stress, expense, and heartache that could have been avoided. I don't want anyone to go through what we did, which is why I founded my firm: to help families like yours avoid unnecessary hardship and create a plan that brings peace of mind.

I understand that life gets busy, and planning for the future is often put off until it's too late. That's why I've made it easy for you to take action, with convenient online meetings that allow you to plan from the comfort of your home.

I've been honored with recognition as a "Best of Hawai'i" estate planning attorney and as one of the "Top 100 Attorneys" nationally, even gracing the cover of the magazine for the latter award. This recognition reflects my commitment to providing the highest level of service and expertise to my clients.

What truly sets me apart is the personal attention and comprehensive guidance I provide. My clients appreciate how I make estate planning both understandable and actionable, and the results speak for themselves in my 5-star ratings on Google and Facebook.

As a native of Hawai'i, I bring a deep understanding of the unique needs of our community. After graduating from the University of Hawai'i, I earned both a Juris Doctor (J.D.) and a Master of Business Administration (M.B.A.) from the University of San Francisco, before returning home. My experience spans both the government and private sectors, and I have represented clients in Hawaii's Circuit Courts, equipping me with the expertise to find the most effective solutions for your family.

Whether you're just starting out or planning for your golden years, I'm here to help you create a plan that ensures your loved ones will be cared for, no matter what life brings. Let me help you achieve the peace of mind you deserve.

# OFFICE LOCATION

Our office is located at Century Square, 1188 Bishop Street, on the corner of Beretania and Bishop Streets in Downtown Honolulu. We are situated on the 27th floor in Suite 2706.

Please note, we operate by appointment only and do not accommodate walk-ins.

For your convenience, we conduct all meetings online to ensure flexibility and efficiency.





# RAVE REVIEWS FROM JUST A FEW OF OUR THRILLED CLIENTS



**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!**



# IN THE NEWS...AND ON THE COVER



## THE TOP 100 ATTORNEYS

### FEATURING KEONI SOUZA

Celebrating  
our 15th  
Year of  
Publishing







# Keoni SOUZA

FOUNDING ATTORNEY

In the heart of Honolulu, the Law Office of Keoni Souza stands as a beacon for families aiming to secure their legacies. Founded in 2017 by Native Hawaiian, Keoni Souza, this legal haven is not just another estate planning firm. It represents the synthesis of cultural nuances, business acumen, and legal expertise, all culminating in a service that is intrinsically Hawaiian.

At its core, Keoni's practice revolves around ensuring the future: safeguarding families and estates, orchestrating seamless business successions, and skillfully preventing family disputes. His foray into the legal realm, marked by significant stints in both the private sector and government, has imbued him with a panoramic view of estate planning. This broad perspective, enhanced by his education in law and business, is what empowers Keoni to tackle estate planning from all angles.

What truly distinguishes Keoni's firm from others is its drive to offer more than just traditional financial legacy services. Recognizing the essence of Hawaii, with its rich tapestry of stories, values, and traditions, the firm emphasizes the intangible. It focuses on those ethereal assets — the stories, the experiences, the values — often overlooked in conventional estate planning, yet invaluable to the heartstrings of loved ones.

But Keoni's vision extends beyond just drafting wills or trusts. He's an educator at heart, and his passion manifests in his dedication to community enlightenment. With numerous educational seminars under his belt, he endeavors to bridge the legal information gap, offering the community valuable insights into estate planning's often complex world.

Eschewing the customary estate planning approach centered on the elderly, Keoni pivots towards an underserved demographic — young families, especially those with minor children. This intentional focus emerges from his understanding that estate planning isn't just about the twilight years, but about securing the present and future for those most vulnerable. Through this lens, Keoni and his team have cultivated systems to democratize access to personalized estate planning, once the purview of the ultra-affluent.

The firm's ethos is rooted in its understanding of Hawaii and its residents. They acknowledge that for many, estate planning isn't just about property or money. It's about ensuring that a grandmother's lullaby, a father's life lessons, or a mother's treasured recipes endure. It's about ensuring that while tangible assets provide for material needs, the intangible assets nourish the soul.

Beyond his professional endeavors, Keoni's commitment to community upliftment shines. His firm staunchly backs community organizations, perpetuating positive change. Born and raised in Hawaii, Keoni isn't just practicing law; he's sculpting legacies, ensuring that both tangible and intangible treasures traverse generations in the true spirit of Aloha.

We spoke with Keoni to learn more about his unique take on estate law and how his firm has created a much-needed niche in the legal arena.

## **Why did you gravitate towards estate law?**

While still in law school, I faced an unexpected family crisis: my mother, at 52, suffered a stroke and heart attack, plunging us into the maze of estate planning. We wrestled with soaring facility charges and the gut-wrenching realization that she didn't get the



quality of life she deserved. Navigating this ordeal, I learned firsthand the value of proactive planning. The financial and emotional toll on my family, the costly legal proceedings — all these hardships could have been sidestepped had we had preemptive estate planning. I embraced this field to ensure others don't endure such anguish.

**How does your approach to estate planning set you apart?**

I don't treat estate planning as mere business—it's my passion. I champion a heart-centered approach providing my clients with the kind of care, attention, and trust, I would want for my own loved ones. Recognizing life's fluidity, we conduct complimentary regular reviews, ensuring plans stay relevant with evolving personal circumstances and legal regulations, so everyone and everything clients love stay out of court and conflict. My commitment extends beyond paperwork, offering clients genuine peace of mind and confidence in their estate plans.

**You also offer a distinctive protection plan for minors. Could you delve into this?**

When my mother became incapacitated, my brother was still a high schooler in Hawaii, while I was attending law school in California. The ordeal underscored the vulnerability of minors during such crises. I've instituted a child protection method that prevents minors from landing in unfamiliar environments, like foster care. Traditional protocols see children transferred to the state's care as only parents possess legal rights. I counter this by equipping families with a set of legal tools that endow a chosen, trusted person with the necessary authority to care for the children. This innovation keeps children amidst familiar faces.

**Beyond tangible assets, you have a profound commitment to preserving familial and cultural legacies. Could you explain?**

Traditional estate planning often overlooks a family's intangible treasures—values, tales, memories. I bridge this gap through interviews, capturing clients on video, enabling families to pass on more than just wealth. This service resonates deeply with me due to a personal loss: a cherished voicemail from my late grandmother that vanished. It was her last remnant, and its loss devastated me. Now, I ensure families have an emotional keepsake alongside their estate plan, providing a holistic legacy.

**Lastly, what fuels your passion in this profession?**

The profound gratitude expressed by clients propels me forward. Their relief, their conviction that they and their families are safeguarded—it's intensely gratifying. I thrive on bestowing genuine peace of mind, shielding families from legal quagmires, and potential discord. Every thankful client affirms my purpose, reminding me of the profound impact I have on their lives and driving me to persist in my mission.



"I don't treat estate planning as mere business—it's my passion. I champion a heart-centered approach providing my clients with the kind of care, attention, and trust, I would want for my own loved ones."



**CONTACT:**

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