Vanilla

Advanced Trust Package

Sophisticated estate planning for complex situations, built to last for generations.

Best for

- High-net-worth clients with potential estate tax exposure
- Business owners and clients with complex asset structures
- Clients with blended families or multi-generational wealth goals
- Those who want to maximize what passes to heirs and minimize what goes to taxes

What you'll create

Document	What it does
Revocable Living Trust	The foundation of a comprehensive estate plan that holds assets and directs distribution outside of probate.
Pour-Over Will	Ensures any assets not already in the trust are captured and directed into it at death.
Certificate of Trust	A summary document used when managing trust-held assets without disclosing the full trust.
Credit-Shelter / Advanced Tax Provisions	Structures designed to maximize use of estate and gift tax exemptions, potentially saving significant taxes for your heirs.
Financial Power of Attorney	Names someone to manage your finances if you become incapacitated.
Healthcare Advance Directive	Documents your wishes for medical decisions if you're unable to communicate them yourself.
HIPAA Authorization	Grants your named person(s) access to your medical records and the ability to speak with your healthcare team.

What happens after?

Once you complete the online questionnaire, your documents are prepared and available to download within a few business days, or you can pay to have them printed and shipped directly to you. You'll then print them, sign in front of a notary in accordance with the requirements of your state, and return a copy to your advisor, who will keep them on file as part of your ongoing financial plan.

Estimated time to complete: Approximately 60+ minutes (your advisor will guide you through this package). Advanced planning documents involve more complexity. Your advisor will be closely involved throughout the process and may connect you with an attorney through the Vanilla Attorney Network.