COMPREHENSIVE PROCESS

1 Education Session
- Seminar/Workshop
- TAEP Workshop
- Referral from existing client/advisor

Opportunity to learn about process, practice model, fees.

2 Family Wealth Planning Session
- Get Acquainted
- Review Where Things Stand For You Now
- Identify Areas of Concern
- My Recommendations to You

Initial Design Meeting

1-2 Weeks

3 Design/ Planning Session
- Receive Confirmation of Names and Fiduciaries
- Receive Family Wealthy Inventory

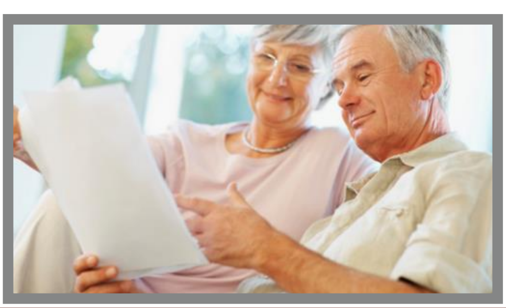
3 -4Weeks

4 Signing Ceremony
- Review Your Plan and Plan Documents
- Answer Your Questions
- Sign Your Plan Documents
- Schedule Funding Meeting
- Scan All Documents
- Create CD
- Original Will, Guardianship, and Backup CD

About 1-2 Weeks

5 Asset Alignment / Financial Action Checklist

6 Family Legacy Meeting
- Deliver Your Binder with Originals and CD
- Review Your Kids Protection Plan
- Review Letters to Your Plan Fiduciaries
- Check on Status of Your Funding
- Conduct Your Priceless Conversation



Family Protector Program™

SHAH & Associates, P.C.

Your Family • Your Business • Your Legacy

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