Wealth Preservation Solution™

Morris Law Group's unique process of designing and maintaining your personal and comprehensive wealth preservation plan to meet your goals and objectives, reduce your taxes and costs, and protect the interests of you and your beneficiaries.

Discover

Client reviews and completes intake package and provides financial information along with existing estate, business and all financial documents.

Discuss

- Continue ongoing oversight and maintenance
- Periodic review of your goals and objectives
- Communicate with you and your advisors
- Update your wealth preservation plan as needed

Design

Strategy meeting to:

- Gather information
- Review goals and objectives
- Develop Wealth Preservation Strategy
- Affirm our relationship to prepare your plan
- Review and discuss plan with your other advisors

Deliver

With your goals developed and the groundwork laid, your team will:

- Create and prepare your plan
- Review your plan with you
- Assure your goals and objectives are met

Direct

- Meet with your Implementation Team
- Review and execute your plan
- Preparation and execution of asset alignment documents
- Implementation Team consults with advisors and verifies the proper titling of assets

Morris Law Group

Wealth Preservation Attorneys

Boca Raton · Aventura · Weston · West Palm Beach