



Yourefolio

JANUARY 1, 2021 - The Law Office of Keith R. Miles, LLC is pleased to announce the usage of a new tool, **YourEfolio**, specifically geared towards estate planning. The software is extensive and at the heart of the program is the Interactive Estate Planning Module (iEPM).

The iEPM has some of the following features:

- ❖ Incorporating an avatar into the intake process;
- ❖ Assembling a detailed estate planning summary report for clients to help review that all assets are captured;
- ❖ Projecting estate tax liability with a tax tool showing the potential effects of estate taxes after death; and
- ❖ Providing manually customizable flowcharts which allow for the creation of graphic illustrations for clients to show them the effects of proposed strategies.



HOW TO PROCEED NEXT:

1. Get an overview of the firm at www.TheGeorgiaElderLawyer.com;
2. Go to my appointment scheduler through the “Schedule Today” button on the Home Page or use this link: <https://lawofficeofkeithrmilesllc.as.me/schedule.php>
3. Schedule one of the following options: #3 *-1st Consultation for Legacy and Estate Planning* or option #5 *-1st Consultation for Estate & Gift Tax Planning*
4. Fully complete the categories in the iEPM
5. Receive a detailed automated Estate Plan Overview Report in preparation for your 1st consultation that outlines the following items:
 - ❖ *Beneficiary Information*
 - ❖ *Balance Sheet*
 - ❖ *Assets*
 - ❖ *Legal*
 - ❖ *Beneficiary Designations*
 - ❖ *Plan Design Summary*
 - ❖ *Special Instructions*
 - ❖ *Miscellaneous Instructions*