

# Providing Planning Services in Arizona since 2001.

## LONG TERM CARE SOLUTIONS



### Consulting

- Estate Planning
- Life Care Planning
- Medicare Insurance
- Long Term Care Planning
- Medicare Insurance Planning
- ALTCS, AHCCCS, AZ Medicaid
- Government Assistance Benefits
- Miller Trust (aka: Income-Only Trust)

### Insurance Services

- Education, Evaluation, Options
- Medicare Insurance Sales
  - Medicare Supplement Plans
  - Medicare Advantage Plans
  - Special Needs Plans
  - Prescription Drug Plans
- Ancillary Insurance (stroke, cancer, hospital indemnity, heart attack, stroke, dental, vision, accidental death)
- Long Term Care Insurance
- Agent Recruitment & Development

### ALTCS-Related

- Miller Trust
- Special Treatment Trust
- Planning & Spend Down
- Medicaid Compliant Annuities
- Medicaid Compliant Funeral Trusts

### Legal Documents

- Power of Attorney:
  - financial, medical, & mental health
- Property Deeds & Beneficiary Deeds
- Advanced Directives, Oral Feeding Directive
- HIPAA Waiver, Final Dispositions
- Special Needs Trusts
- Wills & Trusts
- & DIY Estate Planning Software
  - [www.cam-edp.com](http://www.cam-edp.com)

### Income-Only Trust

- Miller Trust Preparation
- Share of Cost Calculations
- Room & Board Calculations
- Help completing Distributions request/form

Montgomery & Associates, Inc. PO Box 458 Mesa, AZ 85211-0458

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# Legal Document Preparation

<b>LIFE CARE PLANNING</b>			
(1) Power of Attorney Financial <b>\$150</b>	(2) Power of Attorney Medical / Health Care <b>\$100</b>	(3) Power of Attorney Mental Health Care <b>\$100</b>	(4) Living Will aka: Advanced Directives <b>\$50</b>
(5) Dementia - Oral Feeding Directive <b>\$50</b>	(6) HIPAA Waiver <b>\$50</b>	(7) Final Disposition <b>\$50</b>	(8) Last Will & Testament <b>\$350</b>
Life Care Planning (LCP) Single Package A (Docs 1-4) <b>\$300</b> Package B (Docs 1-7) <b>\$415</b>	Life Care Planning (LCP) Couple Package A (Docs 1-4) <b>\$600</b> Package B (Docs 1-7) <b>\$825</b>	Life Care Planning (LCP) Plus Single Package A (Docs 1-4, 8) <b>\$565</b> Package B (Docs 1-8) <b>\$675</b>	Life Care Planning (LCP) Plus Couple Package A (Docs 1-4, 8) <b>\$1,125</b> Package B (Docs 1-8) <b>\$1,350</b>
<b>ESTATE PLANNING</b>			
(8) Last Will & Testament <b>\$350</b>	(9) Last Will & Testamentary Trust <b>\$500</b>	(10) Codicil to Will (11) Trust Amendment <b>\$200</b>	(12) Deeds (Quit-claim, beneficiary +) <b>\$200</b>
Estate Planning Portfolio Hands-On (Single – LCP, Will, Trust+) <b>\$1,650</b>	Estate Planning Portfolio Hands-On (Couple – LCP, Will, Trust+) <b>\$2,350</b>	Estate Planning Portfolio Do-It-Yourself <a href="http://www.cam-edp.com">www.cam-edp.com</a> (Single – LCP, Will, Trust) <b>\$1,495</b>	Estate Planning Portfolio Do-It-Yourself <a href="http://www.cam-edp.com">www.cam-edp.com</a> (Couple – LCP, Will, Trust) <b>\$1,495</b>
<b>OTHER DOCUMENTS &amp; TRUSTS</b>			
Caregiver Agreement <b>\$200</b>	Probate Related Small Estate Affidavit <b>\$100+</b>	Special Needs Trust <b>\$999+</b>	VA/Medicaid Planning Trust <b>\$999+</b>
Special Treatment Trust Disabled<65 <b>\$999</b>	Special Treatment Income-Only Trust Basic – DIY <b>\$300</b>	Special Treatment Income-Only Trust Standard – DIY w/Guide <b>\$600</b>	Special Treatment Income-Only Trust Premium – Hands On <b>\$1200</b>
Legal documents prepared by Carol Aragon-Montgomery, AZ CLDP #80427			

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Did you know **ONLY 1 in 4 people** in Arizona have completed their life and end-of-life care planning legal documents and **over 60%** of people lack will or estate planning ([AARP.org](http://AARP.org))?

In Arizona alone, our adult population is over **FIVE** million people ([US Census](http://US Census)).

That means almost **FOUR** million people have NO documents in place!!!

Help us change those statistics!

Here are some options to help you get your legal documents in place:

Legal Document Options:	FREE Resources	Hands-On Assistance Life Care Planning Package	Hands-On Assistance Life Care Planning & Will Package	Hands-On Assistance Estate & Life Care Planning Portfolio	Online Do-It-Yourself Estate & Life Care Planning Software
<b>What's included:</b>	<a href="http://superiorcourtmr.maricopa.gov/lrc/court-forms/">Financial Power of Attorney</a> <a href="http://www.azagov/seniors/life-care-planning">https://superiorcourtmr.maricopa.gov/lrc/court-forms/</a> <a href="http://www.azagov/seniors/life-care-planning">Life Care Planning</a> <a href="http://www.azagov/seniors/life-care-planning">https://www.azagov/seniors/life-care-planning</a> <a href="http://azsos.gov/services/advance-directives">Advance Directives Registry</a> <a href="http://azsos.gov/services/advance-directives">https://azsos.gov/services/advance-directives</a>	Financial POA Health Care POA Mental health care POA Living Will Signing & Explanation Witness Notary	Last Will & Testament Financial POA Health Care POA Mental health care POA Living Will Signing & Explanation Witnesses Notary	Living Trust Last Will & Testament Deed Financial POA Health Care & Mental health care POAs & HIPAA Waiver Living Will Dementia Oral Feeding Directive Final Disposition form HIPAA Waiver Signing & Explanation Witnesses, Notary	Living Trust Last Will & Testament Financial POA Health Care POA Living Will Funding Kit Document Vault  <b>Unlimited access to update and modify your documents for your lifetime</b>  *If in AZ – first documents can include signing with witnesses and notary at our firm.
1 person price:	<b>FREE</b>	<b>\$300</b>	<b>\$565</b>	<b>\$1,650</b>	<b>\$1,495</b>
Couple price:	<b>FREE</b>	<b>\$600</b>	<b>\$1,125</b>	<b>\$2,350</b>	
Prepared by:	YOU Download & Print	Carol Aragon-Montgomery AZCLDP #80427 480-464-4968			YOU through step-by-step online instructions at <a href="http://THIS LINK">THIS LINK</a> . <a href="http://www.cam-edp.com">www.cam-edp.com</a>
Available in:	ARIZONA	ARIZONA	ARIZONA	ARIZONA	NATIONWIDE

\* Life Care Planning includes: Health Care POA, Mental Health Care POA, and Living Will documents

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# Miller Trust Packages - Income-Only Trust

<b>\$300</b>	<b>BASIC</b>	<b>The Ultimate Do-It-Yourself Kit</b>
<p><b>Includes:</b> Trust preparation, Overview of trust, Basic To-Do List</p> <p><b>OUR GUARANTEE:</b> Completed within 1 business day (if payment and completed form received)</p>		

**Two other options:**

<b>\$600</b>	<b>\$1200</b>
<b>BASIC+</b>	<b>PREMIUM</b>
<b>Do-It-Yourself with Guide</b>	<b>Hands-On Assistance</b>
<p><b>Includes:</b> Trust preparation, Overview of trust, Detailed To-Do List, Blank ALTCS forms, ALTCS-compliant direct deposit/debit change forms</p>	<p><b>Includes:</b> Preparation &amp; signing of trust, In-person meetings with: Trustor (person needing trust, if signing his/her trust) &amp; Trustee (explain trust &amp; requirements) &amp; Banker (if you want help opening the trust account), Completed forms and letters (if info provided), Binder with detailed written instructions, Mailing the binder to you, and Home visit fees*** (if needed for Trustor signing).</p>

\*\* If you have already spent this month's income, we will schedule the appointment for the week in which the next month's income is received.

\*\*\* Home visit fees included for Phoenix Metro area; \$0.50 per mile round trip if outside Phoenix Metro area.

<b>OUR GUARANTEE:</b> Completed within 1 business day (if payment & completed form received)	<b>OUR GUARANTEE:</b> If you need the trust this week, you will get the trust & appointment this week**!
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<a href="http://www.incomeonlytrust.com">www.incomeonlytrust.com</a>	<a href="http://www.altcsplanning.net">www.altcsplanning.net</a>
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# Medicare Insurance

This service is offered at no cost to you.\*

## Never fear, we are here.

We are licensed Medicare Insurance agents.

We know the ins and outs for ...

- Medicare eligibility due to a disability
- Aging into Medicare (turning 65)
- Switching from other insurance to Medicare
- Medicare and Medicaid eligibility
- Low-income subsidy and extra help

## But wait! There's more.

Whether you are...

**Already on Medicare**

**Retiring or Turning 65**

### We can help you...

- Understand your benefits
- Identify the most useful plan for your medical needs
- Figure out if changes need to be made during annual enrollment
- Learn about your new options
- Select your plan(s)
- Transition from your employer plan to a Medicare plan
- Identify extra help options

\*If you decide to enroll in a Medicare Insurance Plan or other Ancillary Insurance plan, we are compensated by the company.

This is an advertisement. Calling the number provided will direct you to a licensed sales agent.

**480-464-4968**

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