

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

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

www.altcsplanning.net | www.incomeonlytrust.com | www.maia-us.com | www.cam-edp.com | www.cam-soc.com

P: 480-464-4968 | F: 480-969-9779



LTC Planning

Miller Trusts

Legal Documents

Medicare Insurance



Your One-Stop Resource for Long Term Care Planning!

Legal Document Preparation

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

In Arizona alone, our adult population is over **FIVE** million people (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
What's included:	Financial Power of Attorney Life Care Planning Advance Directives Registry	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 Unlimited access to update and modify your documents for your lifetime <small>*If in AZ – first documents can include signing with witnesses and notary at our firm.</small>
1 person price:	FREE	\$300	\$565	\$1,650+	\$1,495
Couple price:	FREE	\$600	\$1,125	\$2,350+	
Prepared by:	YOU Download & Print	Carol Aragon-Montgomery AZCLDP #80427 480-464-4968			YOU through step-by-step online instructions at THIS LINK . www.cam-edp.com
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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ESTATE PLANNING FOR EVERYONE...

Our legal system is expensive, but protecting your family shouldn't be. Many people don't have an estate plan because they can't justify many hours of attorney fees.

EstateDocsPro.com was built to solve this problem. Because everyone should have access to affordable, attorney drafted solutions to protect their family and give them peace of mind. The law is complex, our software makes it easy.

Carol Aragon-Montgomery

PO Box 458 Mesa, AZ 85211

carol@altcsplanning.net

480-464-4968

Benefits:



EASY: Built for you and me

We hate "legalese". It is an un-needed barrier between you and your plan. We work in plain English, just like you! Follow a simple step by step interview with "pop-up help" to explain specific terms unique to estate planning. You don't need any experience to build a plan customized to you!



FAST: No more waiting

You could be printing your plan in about an hour. Our revolutionary technology streamlines the interview process and our servers compile your documents as you complete questions. You can print your completed plan as soon as you finish the interview, no waiting!



AFFORDABLE:

Our technology saves you money by spreading the cost of hiring expert estate planning attorneys across thousands of users. Plus FREE updates with an active account. We believe everyone should have the best and most up to date estate plan so we are the never charge when you make changes.



FLEXIBLE:

Our documents were prepared by estate planning attorneys with decades of experience helping thousands of clients nationwide. Every family situation, asset class, and bequest option is at your fingertips. Our technology allows you to build what you want and keep you in control.



CONVENIENT:

Powered by advanced software, you have immediate access to your Comprehensive Estate Plan documents 24/7 from anywhere via the internet.



PROTECTION: Spendthrift Provisions

Spendthrift provisions are included which prevents creditors of any beneficiary from touching their share of trust assets.



PROTECTION: Joint Trust for Children & Grandchildren

If you have children (even grown kids) you have the option of creating a sub-trust to hold their assets until they reach a certain age or split distributions over time at three different ages. This prevents a potentially immature young adult from receiving a windfall that might cause more damage than good. You can even allow early withdrawal for educational expenses, first home, wedding or even a business.



ATTORNEY DRAFTED:

Documents created by Expert Estate Planning attorneys with decades of experience. Our attorneys have worked tirelessly to make sure these documents are complaint in all 50 states. So you can have a comprehensive estate plan, and know that it was done right!



SECURE:

Your information is important to us. We never share your data unless you authorize it. All communications utilize SHA1/RSA 2048bit keyed SSL encryption, all data is encrypted in transit and at rest with sensitive data encrypted at 4096 bits. Independent analysis by SSL labs has given our security an "A" rating.



POWERS OF ATTORNEY:

A Power of Attorney will give your appointed agent the power to make certain decisions on your behalf when you are unable to do so. Our comprehensive package includes both Financial and Healthcare Powers of Attorney, Durable HIPPA Statement and a Durable Agent Notice.

Miller Trust Packages - Income-Only Trust

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

Two other options:

\$600	\$1200
BASIC+	PREMIUM
Do-It-Yourself with Guide	Hands-On Assistance
<p>Includes: Trust preparation, Overview of trust, Detailed To-Do List, Blank ALTCS forms, ALTCS-compliant direct deposit/debit change forms</p>	<p>Includes: Preparation & signing of trust, In-person meetings with: Trustor (person needing trust, if signing his/her trust) & Trustee (explain trust & requirements) & 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.

OUR GUARANTEE: Completed within 1 business day (if payment & completed form received)	OUR GUARANTEE: If you need the trust this week, you will get the trust & appointment this week**!
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www.incomeonlytrust.com	www.altcsplanning.net
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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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Your Medicare medical coverage may not cover all your medical needs.

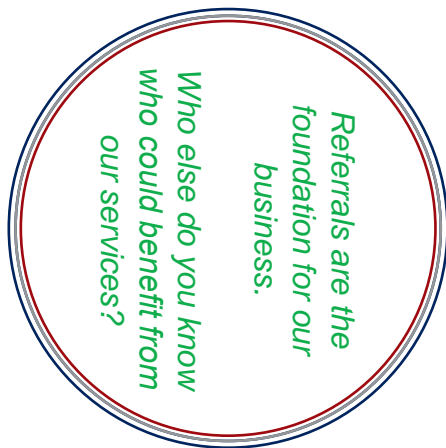
That's why we contract with several companies to offer the ancillary insurance plans listed.

1. Dental, Vision, & Hearing - This is our most requested ancillary product!
2. Cancer & Heart Attack or Stroke - Pays lump sum of cash when diagnosed with one or more of these conditions*
3. Hospital Indemnity - Pays for out-of-pocket costs associated with your current medical coverage*
4. Recovery Care - Pays recovery care costs in skilled nursing, assisted living, and at home*
5. Short-Term Home Care - Pays recovery care costs at home*
6. Final Expense / Funeral Trust - Pays a benefit at your death to help cover your final expenses and burial
7. Long Term Care Insurance - Pays for long term care expenses in a nursing facility, assisted living, or at home.

**DON'T DELAY!!!
GET COVERAGE BEFORE THAT
UNEXPECTED RAINY DAY.**

Schedule your complimentary appointment today!!
CALL 877-482-8878 TTY: 711

*Underwriting guidelines may apply



**Please deliver to:
Current Resident**



Montgomery & Associates Insurance Agency
PO Box 458 Mesa AZ 85211

MEDICARE INSURANCE OPTIONS THAT ARE RIGHT FOR YOU!

We are licensed, certified, and appointed with most major health insurance companies in the following states:



Arizona



Minnesota



New Mexico



South Carolina

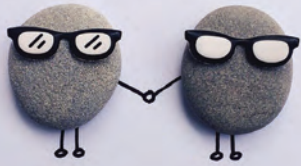
**Appointments are
complimentary.**

**Call to schedule your
appointment today!**



P: 877-482-8878 TTY: 711
W: www.maia-us.com
E: info@maia-us.com

Calls answered M-Th 9:00a - 5:00p
by licensed insurance agents.



There are SO many Medicare insurance plans in your area.

- How do you know which one is right for you?
- How do you compare plans and options?
- Are you missing out on any benefits?

Figuring this out can feel **OVERWHELMING** and **DAUNTING!**

Are you capable of researching and enrolling on your own?

OF COURSE YOU ARE!!!

But why not receive **NO COST** personalized service through one of our licensed agents.

WE WORK FOR YOU!

CALL TODAY!
877-482-8878 TTY: 711

PERSONALIZED MEETINGS



We set up an initial meeting to get to know the real you. Asking questions about your health needs gets you one step closer to finding a plan best suited for you.

VALUE



We want to make sure the time you spend with us is valuable. With your input we complete research and identify areas where you can save money, because every dollar matters!

RESEARCH



We do research based on your desires when you initially enroll and we research each year to make sure your plan continues to work for you.

KNOWLEDGE



We ensure you understand the features and benefits of your Medicare plan.

KEEPING YOU INFORMED



We provide you with helpful tools and reminders so you can continue to get the most out of your health plan.

EXPECT THE UNEXPECTED



We offer other insurance products and legal document preparation because we want you to be prepared for any rainy day.



- Enroll in Medicare Parts A & B**
- Make a list of your doctors and providers**
 - Name
 - Address
 - Phone number
 - Reason seen
- Make a list of all prescribed medications**
 - Name
 - Dosage
 - Frequency taken
 - How often refilled
- Schedule your complimentary appointment with one of our licensed agents**

Licensed Agents:
George Montgomery
Carol Aragon-Montgomery



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