

# Family Shield Workshop



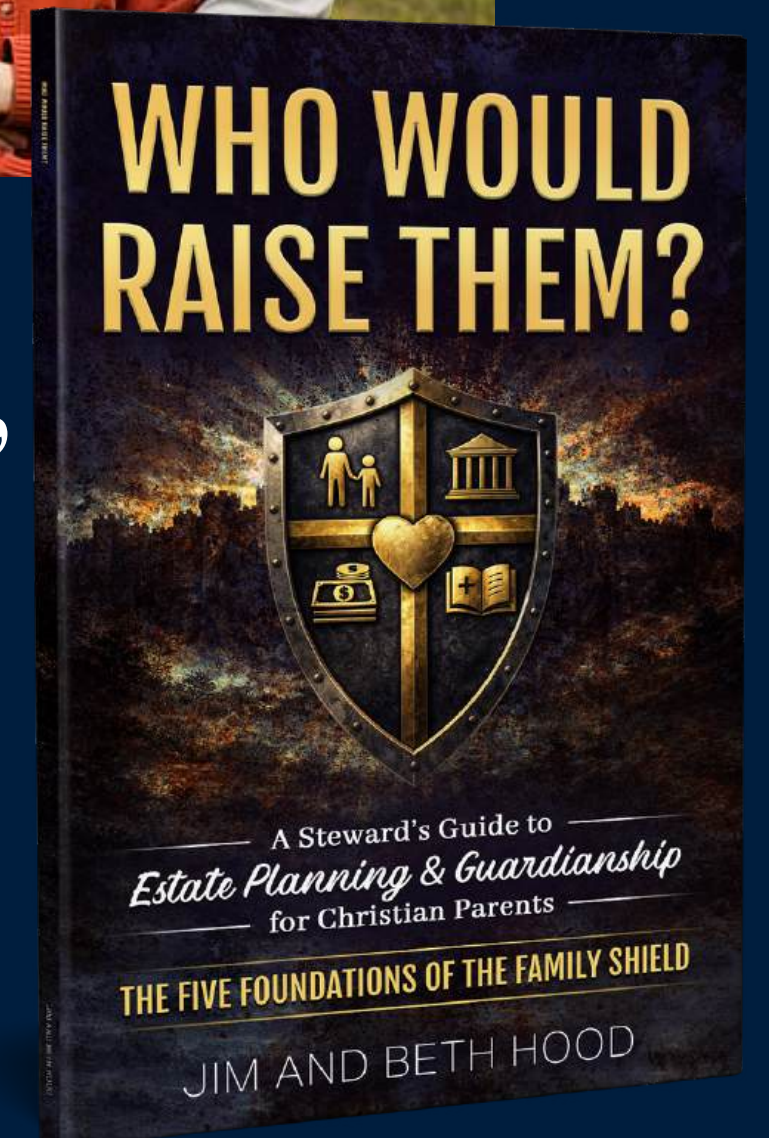
How to Move from  
Good Intentions to a Plan  
That Protects Your Family

# Who We Are

Jim & Beth Hood

Family Shield Estate Planning

Authors of “Who Would Raise Them?”



# Tonight's Roadmap

- The Five Foundations
- The Structure
- Guardianship
- Where Families Get Stuck
- Next Steps

Today's presentation is for educational purposes only. This is not a substitute for individualized legal or financial advice.

**Tonight:**  
**The Framework.**

**Planning Call:**  
**Your Family's Application**

Live Attendee Gift:

Family Shield

Conversation Starter Kit



Share your name in chat & we'll email you the kit.

# The Steward's Audit is a Starting Line

- Shielded
- Partially Protected
- Vulnerable



# The Five Foundations of the Family Shield:



1. The Guardian
2. The Structure
3. The Provision
4. The Blueprint
5. The Heart

# The Structure is Where Clarity Begins

Wills. Trusts. Probate.  
Powers of Attorney.  
Guardianship.



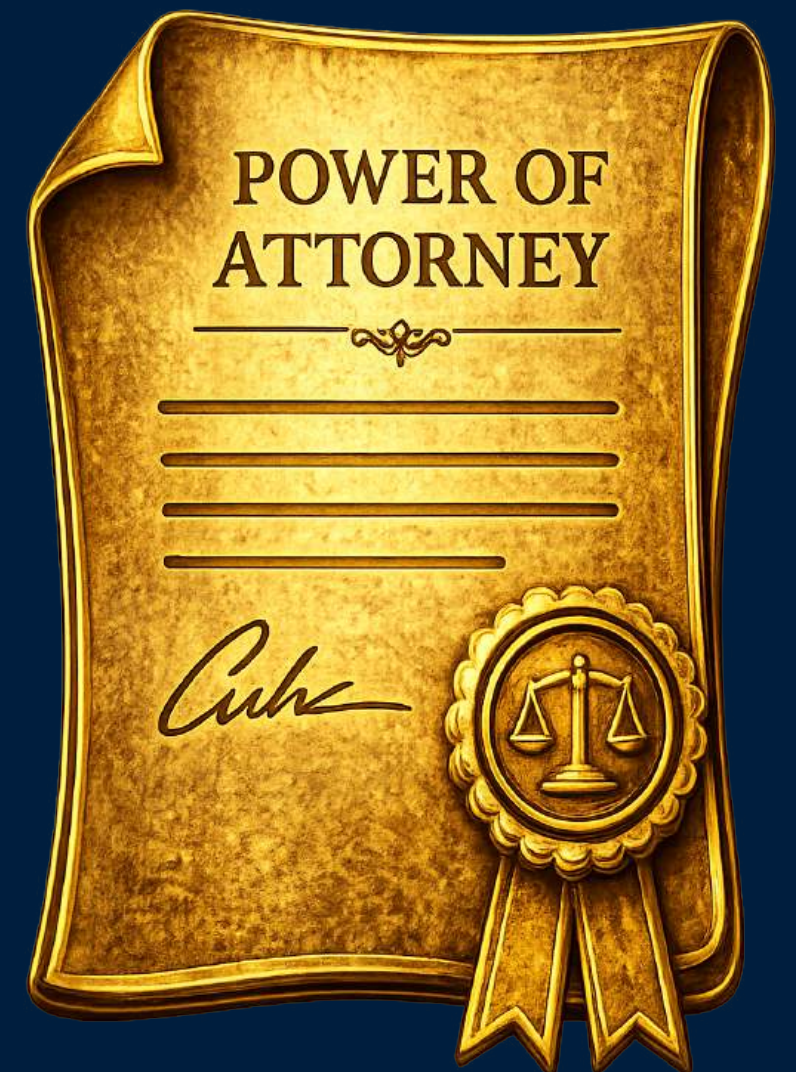
# Three Types of Documents Families Need

- Living Documents
- End-of-Life Documents
- Transfer-After-Death Documents

# Living Documents

Who can act if you are alive but unable?

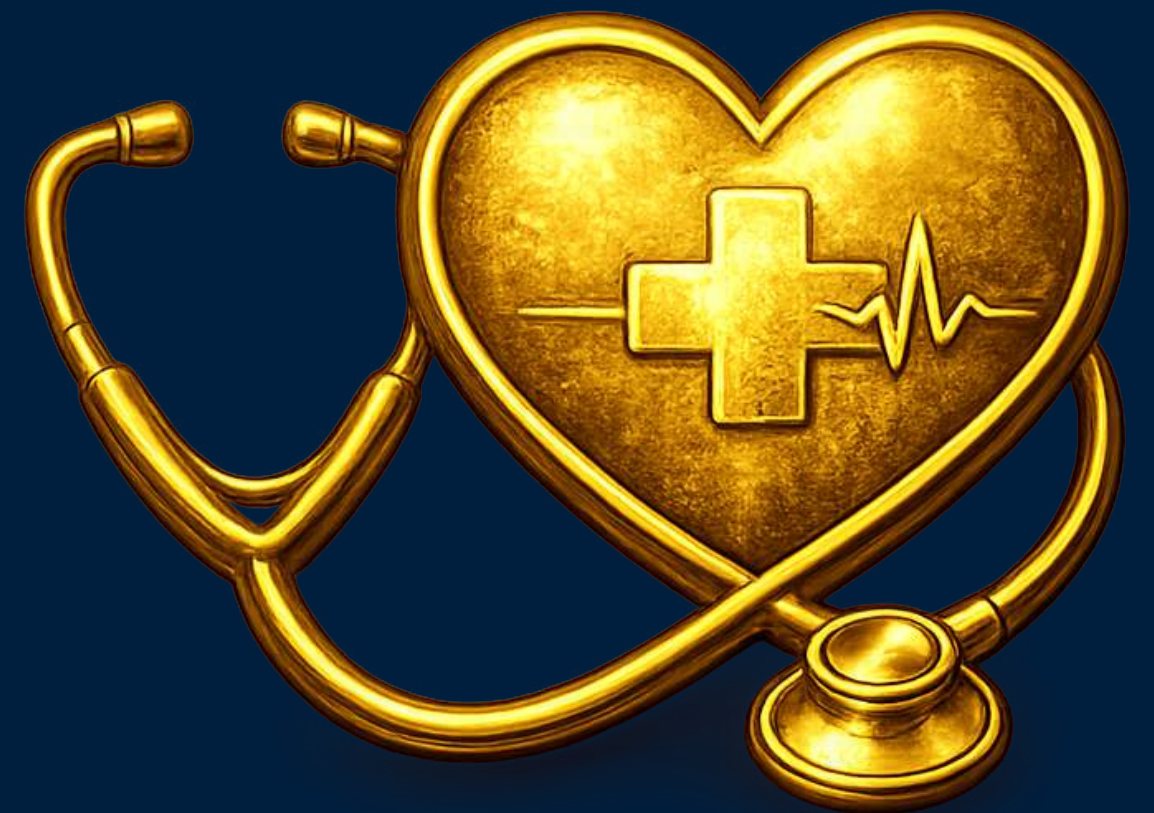
- Financial Power of Attorney
- Healthcare Power of Attorney



# End-of-Life Documents

What medical wishes should guide my family if I cannot speak for myself?

- Healthcare Directive
- Living Will



# Transfer-After-Death Documents

How should assets, authority, and instructions transfer after death?

- Wills
- Trusts
- Beneficiary Designations



# The Three Paths

- No Documents
- Will-Based Plan
- Trust-Based Plan

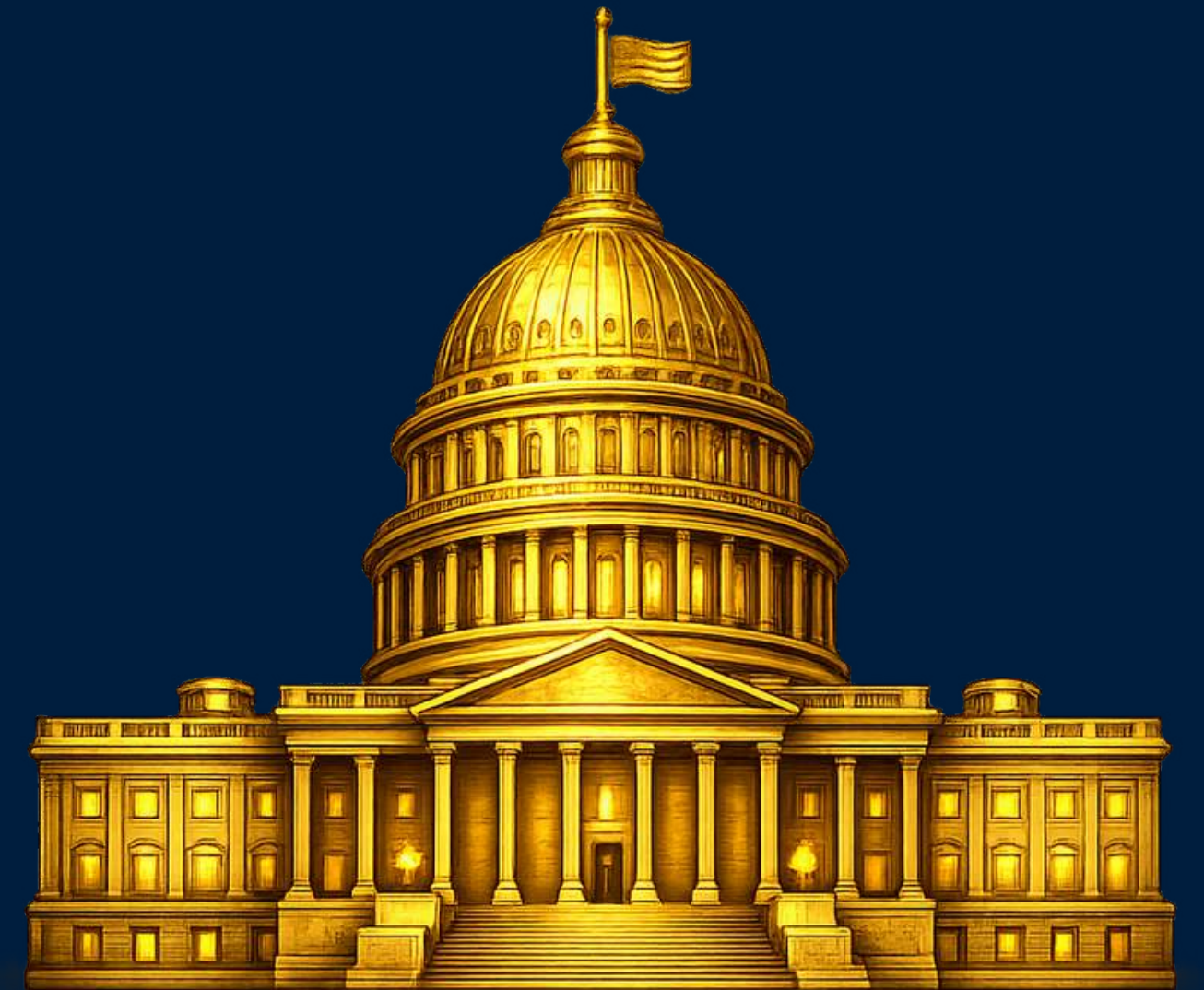


# Path 1: No Documents

The state's default plan  
becomes your plan.

Legal? **Yes.**

Personal? **No.**



# When the Default Plan Takes Over

- Minor children
- Blended family
- Court involvement
- Inheritance at 18



# Path 2: Will-Based Plan

A will gives guidance.  
But it may not avoid  
court.



# Probate is the Opposite of a Shield

- Public
- Slow
- Expensive
- Stressful



“Grief breaks the decision-maker.”

“When grief and loss meet assets and money, people can get wonky.”

# Path 3: Trust-Based Plan

A private structure  
for your family's  
instructions.



# A Trust Can Control Timing

Not just who gets what.

How they receive it.

When they receive it.

What it may be used for.



# Trusts Are Not Just for the Wealthy

They are for families who need:

- Clarity
- Authority
- Privacy
- Timing



# Funding the Trust

Creating the trust is step one.  
Funding the trust helps  
make it work.



# Guardian vs. Trustee

Guardian:  
raises the children.

Trustee:  
manages the money.



# Choosing Guardians: The 4-Point Filter

Not perfect people.  
The best fit available  
right now.



# The 4-Point Guardian Filter

1. Character Alignment
2. Relational Connection
3. Practical Capacity
4. Geographic / Logistical Fit



# The No-Guilt Rule

You are not choosing guardians to keep adults happy.

You are choosing guardians to protect your children.



# Primary + Backup

Chosen.

Asked.

Willing.

Documented.



# Special Needs Planning

A standard inheritance can create unintended problems.



# When Your Child Turns 18

Legal adulthood can  
create a lockout.



# Structure Creates Clarity

But documents are  
only one part of the  
Family Shield.



# Where Families Get Stuck

1. Decisions
2. Documents
3. Execution
4. Organization



# The Family Shield System

A done-with-you completion system.

- Documents
- Decisions
- Guidance
- Organization
- Follow-through



# What's Included

1. The Legal Foundation
2. Decision Guidance
3. The Completion Course
4. The Legacy Blueprint Toolkit
5. The Stewardship Circle



# 1. The Legal Foundation

Your state-specific revocable living trust package.

- Revocable Living Trust
- Pour-Over Will
- Guardianship Nomination
- Powers of Attorney
- Healthcare Directive
- Supporting trust documents
- State-specific signing instructions

# 2. Decision Guidance

We help you work through the decisions that usually cause families to stall.

- Guardians
- Trustees
- Healthcare decision-makers
- Powers of attorney
- Beneficiaries
- Distribution timing
- Backup people

# 3. The Completion Course

Step-by-step guidance from intake to finished plan.

- Intake setup
- Document preparation steps
- Signing and notarizing
- First-wave trust funding
- Binder setup
- Digital vault setup
- Final organization

# 4. The Legacy Blueprint Toolkit

The non-legal guidance most estate plans leave out.

- Guardian Guidance
- Legacy Letter templates
- “We Always” List
- Digital & practical instructions
- Talking-to-kids scripts
- Decision-maker conversation scripts

# 5. The Stewardship Circle

A Family Shield should be maintained.

- Regular Q&A
- Community support
- Review reminders
- Future stewardship trainings
- Lifetime platform access for future updates
- Referral Circle access (\$200 thank-you for qualified enrollments)

# Enrollment

Family Shield System: \$1,997

- Legal Foundation
- Decision Guidance
- Completion Course
- Legacy Blueprint Toolkit
- Stewardship Circle
- Lifetime platform access for future updates



# A Note on Outside Costs

Depending on your family's situation, there may be separate costs for:

- Real estate retitling
- Vehicle title updates
- Notary services
- Special Needs Planning

# Follow-Through Savings

For families ready to take action

- Put your call on Jim's calendar within 7 days  
*The call does not have to happen within 7 days.*
- Enroll on or within 48 hours after your call
- \$200 savings
- \$1,997 → \$1,797

# Payment Option

Pay in full: \$1,997

With Follow-Through Savings: \$1,797

Payment plan: 3 payments of \$697

# Who This Is For

Families who are ready to:

- Stop carrying the weight of unfinished planning
- Make the hard decisions
- Create or update a trust-based plan
- Protect minor children
- Leave guidance, not guesswork
- Follow through

# This May Not Be the Right Fit If...

- You only want the cheapest forms possible
- You are not ready to make decisions
- You do not want guidance or support
- You are unwilling to follow through
- Your situation requires specialized legal counsel beyond the scope of our system

# Your Next Step: FREE Family Shield Planning Call

A 45-minute call with Jim to apply the framework to your family. We'll talk through:

- Current documents
- Guardianship
- Structure
- Provision
- Special circumstances
- Whether the Family Shield System is a fit

# Before Your Planning Call

Please make sure:

- Both spouses have watched the workshop, if married
- Both decision-makers attend the call
- You bring your questions
- You are ready to talk honestly about your family's gaps

# Schedule Your Call

Scan the QR code

Or visit:

[Familyshieldestateplanning.com/calendar](https://familyshieldestateplanning.com/calendar)



# Thank You

We're honored to walk with you.

Scan the QR code to schedule your  
Family Shield Planning Call

Put your name in the chat to receive  
the Conversation Starter Kit.

