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## REASONS TO SELECT MICHAEL J. WITTICK AS YOUR ESTATE PLANNING ATTORNEY

### MY PRACTICE

1. Certified Specialist in estate planning does better job
2. Attitude of service to client before all else
3. Reputation for highest level of honesty, integrity and ethics
4. Three Step Strategy Process of Estate Planning Practice
  - a. Counseling
  - b. Updating
  - c. Settlement
5. Discipline in staying legally current in highly technical and ever changing field, especially through WealthCounsel LLC Education which is of highest quality
6. Organizational and technological systems allowing me to provide superior legal services in a timely fashion
7. Ability to freely acknowledge any matter beyond my expertise
8. Believes very strongly in team approach which satisfies client desire to have many advisors each with one main expertise but wishes them all to work together. Relationships that enable me to enlist the aid of specialized colleagues or advisors in situations that call for a given expertise
9. Testimonials of clients
10. Member, WealthCounsel LLC and WealthCounsel Advisor Forum thought to be so important to some advisor organizations that they formed strategic alliance.
11. Member, Orange County Bar Association, Probate and Trusts Planning Section
12. Member, Estate Planning Council of South Orange County
13. Member, Orange County Association of Insurance and Financial Advisors
14. Member, Financial Planner's Association
15. Teaches estate planning to Insurance professionals, financial advisors and accountants
16. Will take the time necessary to customize each estate plan, necessitating time to educate client sufficiently so that they can set intelligent estate planning objectives and time to then counsel client to design a tailor made plan fitting their objectives. A lack of education is often seen in other potential clients who, for example, did not know that a trust must be funded to be effective or did not know enough to select trustees that will be effective or did not know a multitude of other alternatives that were available to better meet their objectives. Therefore, the primary value of an estate planning attorney is the value of his or her counseling in educating, designing, implementing and administrating the plan. When potential clients say they can "get the same thing for less" they are only addressing the other attorney's "product" or "documents", which obviously are of inferior quality as well because the other attorney is charging a fee that will allow him to mass produce and probably quote a fee over the phone because he knows he will only change the names and produce the same product he produced

yesterday. He also knows that his time will be minimized because there will be little or no counseling.

17. My product is a Mercedes among lesser vehicles in the marketplace. It is based on WealthCounsel LLC Software which is a compilation of 1400 attorneys nationwide and constantly updated to not only comply with current law but also to take advantage of state of the art estate planning techniques contributed to by all members. The comparison of my product with others in the marketplace proves this point over and over again. If the industry “product” was comparable I wouldn’t spend half of my time reviewing other plans that clients want me to restate. Examples of deficiencies in other products in the marketplace are no in home health care instructions, no definition of disability, inadequate powers to accomplish objectives, a lack of leaving property to beneficiaries in trust etc. In summary, I routinely review estate plans drafted by others that are probate in disguise.
18. I specialize in ESTATE PLANS THAT ARE EFFECTIVE

### **OTHER REASONS**

1. Estate planning fees are a very small percentage of total Estate Expenses that typically run into the hundreds of thousands of dollars if not millions of dollars.
2. Any plan which protects your total financial estate that you’ve worked your entire life to accumulate and also protects all of your beloved family members does not warrant going to Costco to get a lawyer for the plan because your ultimate objective should be that the plan will be effective, not to save what is normally no more than a very small amount of money, in fees, a drop in the bucket of total estate expenses if the plan is ineffective
3. Estate Planning fees are normally tax deductible, at least to a certain extent, to be verified by your accountant with my assistance.
4. There is no charge for the initial consultation/seminar or any time taken in the team approach to estate planning
5. There is no charge for the funding of your residence into the plan
6. There is no charge for the second duplicate original of the plan
7. If the client will ever move out of state, it is probable that I could refer that client to another WealthCounsel LLC attorney close to the new residence.
8. Clients can enter a maintenance agreement which potentially includes:
  - a. Trustee Training Workshop
  - b. Reasonable word processing amendments
  - c. Advice on funding, personal changes as well as changes in the law or my experience, and advanced planning
  - d. Reasonable time for meeting and telephone discussions