

Merilyn M. Steele, J.D., C.P.A.
Messner Steele Law Firm, P.C.

Business Service/Product:

- **Legacy Plan** – Create a strategic wealth transfer plan for individuals or families transfer of their wealth to their children and future generations and/or charities.
- **Personal Advocacy** – Formulate, develop and implement a written plan for communication of values, minimization of taxes and transfer of wealth (assets) upon death or disability. Pre and post death trust administration upon death of grantor(s) in order to properly transfer the family legacy.
- **Professional Advocacy** – Formulate, develop and implement a plan for corporations/entities committed to best corporate practices both as to human and financial capital. Long-term business succession planning for passing the baton of ownership and management of a company desiring permanency in the marketplace.

Preferred Market / Individuals/ Companies:

- Individuals and families with higher net worth \$5M - \$50M requiring estate planning
- Family members / friends / colleagues ~ named as trustee of a trust or beneficiaries of a trust requiring legal counsel as to their rights/duties/responsibilities
- Small – medium sized businesses, their owners and corporate executives requiring formation, corporate governance or business succession planning

Typical Program(s) / Services Offered:

- Trust and estate planning / estate, gift, income tax planning/domestic & international
- Charitable giving - strategic planning for efficient wealth transfer to future generations
- Trust administration – Legal counsel to trustee(s) duties/ beneficiaries' rights
- Corporate structure – Formation (profit & non-profit), review, analysis, strategic planning
- Business succession planning – Corporate consulting, poise company for sale or planning for transition to next ownership

Differentiators:

- **Experience:** Legal (24 years), CPA (38 years), Integrate law, accounting, tax planning
- **Law Firm:** 16-year history in San Diego County
- **Customized:** Comprehensive estate plans and asset funding, Tax analysis, Cultivate client's trusted advisor team for smoother transitions upon triggering events
- **Value:** Top shelf quality product(s) and personal service at boutique firm price point

Creating Legacies – Impacting Generations...SM

12636 High Bluff Drive, Suite 400 | San Diego, CA 92130

msteele@createlegacies.com | www.createlegacies.com | T: 858.724.2149 | F: 858.724.2201