

Developed to Simplify Complexity™ & Achieve Your Objectives™



The Foundation Builder™



Having the correct legal documents in place is an essential element of The Strategic Estate Planning System®. The Foundation Builder™ allows us to effectively use our time to learn about your initial estate planning goals. During your initial complimentary one-hour consultation, you will have the opportunity to meet your attorney and share your vision. At Nici Law Firm, your attorney, acting as an Estate Planning Architect, will address your immediate estate planning needs including your Will, Revocable Living Trust, Durable General Power of Attorney and Advanced Directive.



The Strategic Snapshot®

Upon completion of your plan, we take estate planning to the next level and Simplify Complexity™ by offering a tool so powerful and rich in information, that most clients have stated that they “could not imagine an estate plan without The Strategic Snapshot.”™ The Strategic Snapshot® with Asset Analysis™ is a color-coded, visual representation of your estate as it exists today - displaying how your assets are titled, and where and how those assets flow upon your death. The Strategic Snapshot® will uncover any additional issues that we need to address as we progress through The Strategic Estate Planning System®.

The Discovery Experience™



In The Discovery Experience®, we jointly uncover your “true self,” the connection you feel to your family, your beliefs and values, and how your natural talents and strengths influence your actions. Using the Kolbe System® and Strengths Finder 2.0®, we will discover and explore your instinctive talents and abilities, allowing the roots of our relationship to grow deeper and wider, providing a stronger base for our relationship to blossom and a means to clarify your vision for the future.

The Strategic Blueprint™

Capitalizing on your vision, your attorney will create The Strategic Blueprint™, a tool used to show how specific estate planning tools can turn your future vision into a reality today. The Strategic Blueprint™ uses an Integrated Cash Flow Spreadsheet™ displaying how your affected assets will flow through the various legal entities over subsequent years. You will see how millions of dollars can be saved if the plan we design is put into action and you can even compare the plan to a “do nothing” approach.

The Objective Achiever™



The majority of architects sub-out construction - at Nici Law Firm, we design, draft and build the plan from beginning to end. In The Objective Achiever™, we build the plan based on the specs from The Strategic Blueprint™ including any changes that you would like to see. The Strategic Snapshot® will be updated based on your newly built estate plan and the legal documents that support it. At Nici Law Firm, we specialize in Achieving Your Objectives™.

The Support Solution™



Every structure requires maintenance and so does your estate plan. With The Support Solution™, you will receive annual updates to your estate plan. We assure that your plan is kept up-to-date with any revisions that you may desire and any revisions required because of changes in the law.