INTEGRATE LEGACY LAW

IntegrateLegacyLaw.com

OUR BELIEFS

We believe that when you pass away, secure in knowing you left a footprint that's worthy of acknowledgement and admiration, you experience **peace of mind and a sense of accomplishment**. Our heart-centered trust and estate services help you build a powerful legacy. We empower you to define and preserve the comprehensive mark you leave behind.

If done well, **estate planning ensures you leave a legacy** on many levels. If done poorly, estate planning leads to lost opportunities and lost money. We're committed to a creative attorney-client relationship that nurtures your **evolving estate planning goals** and **fuels your family members' love for one another**... now that's transformative!

OUR FIRM

Our top value is to leave our clients with a **clearer sense of what legacy means** to them and a **plan for integrating their legacy into their lives** before the luxury of time is no longer on their side. Our sweet spot is working with working with **Gen X'ers**, **Millenials**, and **LGBTQIA+** couples and families who recently got married, bought a home, and/or had a child. We also love working with people in polyamorous and other alternative relationships. Niches and sweet spots aside, we work with everyone who is committed to planning smartly for the future of their finances and healthcare... all people welcome!

"Our goal is not to do business with the people who need what we have. Our goal is to do business with the people who believe what we believe."

-Simon Sinek

And, at Integrate Legacy Law, we believe in love!

OUR FOUNDER

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OUR OFFICES

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Se habla español

R. Kamela Laird founded Integrate Legacy Law with the commitment to guide her clients to identify their life purpose and then to integrate that legacy into their lives in a way that makes a lasting difference. As an experienced communication and relationship coach, mediator, and spiritual counselor, Kamela integrates these skills with her legal training to provide a heart-centered approach to trust and estates matters.

She has a special knack for supporting clients through challenging family conversations and conflict related to guardianship of minors, aging, end of life care, and distribution of assets. As a pioneer of the collaborative trust & estates field, she works on interdisciplinary teams with Attorneys, Mental Health and Eldercare Professionals, and Certified Financial Planners to deliver her clients a holistic and transformative experience.

Kamela volunteers as a mediator and restorative justice facilitator for multiple non-profit organizations. Kamela is a member of and loves working with others in the LGBTQIAP+ community and those practicing alternative relationships.

OUR COLLABORATIVE APPROACH

Sometimes problems are best solved when professionals from different backgrounds work together. That's why we collaborate with Mental Health Professionals. Financial Specialists and Communication Coaches to bring you the perfect blend of emotional support, legal advice, and financial planning.

We know death isn't easy. We know family relationships can be complicated. Instead of turning a blind eye on the emotional needs of your family, we bring together a team that helps your family have honest and loving communication.

- **Imagine an open and trusting environment where you share with your family exactly how and to whom you want to pass down your assets.**
- **Imagine explaining what type of medical treatment you want or don't want and addressing family members' concerns prior to a medical crisis.**
- **Imagine the opportunity to explain why you're choosing to set up your estate plan this way while everyone is listening.**

With inter-generational and transparent communication, your family is able to avoid costly court battles by resolving family differences with you rather than dealing with conflict after you pass away. In the collaborative approach, we focus on preserving family relationships and creating smooth transitions.

Ask us for a complimentary collaborative assessment if you're into this approach.

OUR SERVICES

Estate Planning

Trust Package for an Individual
$2,000 - $2,600

Trust Package for a Couple
$3,000 - $3,800

Custom estate planning portfolio including a Living Trust, Pour-Over Will(s), Advance Health Care Directive(s), Power(s) of Attorney, Final Disposition Authorization(s), and optional Legacy Letter(s).

Will Package for an Individual
$1,000 - $1,200

Will Package for a Couple
$1,800 - $2,200

Custom estate planning portfolio including a Last Will & Testament(s), Advance Health Care Directive(s), Power(s) of Attorney, Final Disposition Authorization(s), and optional Legacy Letter(s).

Additional Estate Planning Options

Collaborative Estate Planning
Custom

To accomplish your estate planning on a team with a lawyer, communication coach, and financial professional.

Family Education Conversation
$500

Two-hour conversation to educate your key family members and friends on their roles in your estate plan.

Estate Planning Updates
$300/hr

To make changes to your already existing estate planning documents.

Mediation and Facilitation

Integrative Mediation
Custom

To help resolve the deeper emotional aspects of a family dispute with a lawyer and a mental health professional co-mediation team.

Probate Mediation
$300/hr

To resolve your family's conflict after it is already in probate court with the intention of drafting a binding agreement and removing the dispute from litigation altogether.

Family Facilitated Conversations
$250/hr

To provide a safe space to discuss challenging family topics where everyone's voice will be heard.

Dispute Resolution Coaching
$250/hr

To empower you in the midst of a dispute you're experiencing; to offer you new perspectives and new ways to navigate the conflict in your life.

After Death...

Estate Administration
$300/hr

To support you as Executor or Trustee in sorting out the distributions of your deceased loved one's estate.

Probate Representation
Statutory Fee*

To carry out the terms of your deceased loved one's will or the process of intestate succession via Probate Court. *Attorney fees set under CA State Law Probate Code.

Collaborative Trust Administration
Custom

To settle post-death family disputes outside of court on a collaboratively-trained team with a lawyer, Communication Specialist, and financial professional.

Revocable Living Trust

A Revocable Living Trust allows your heirs to avoid the expense, delay and public nature of Probate Court when your gross estate exceeds $150,000. A Revocable Living Trust allows your Successor Trustees to manage your assets for your benefit and the benefit of your loved ones, according to your own detailed instructions.

Pour-Over Will

A Pour-Over Will accompanies every Living Trust. It is the document in which you name a legal guardian for your minor child(ren) in the event you become mentally incapacitated or pass away. The Pour-Over Will enables your Successor Trustees to put any omitted assets into your trust after your death.

Durable Power of Attorney

A Durable Power of Attorney allows you to name an Agent who will be able to exercise certain financial rights in the event you become incapacitated. These rights include filing insurance claims, filing taxes, applying for public benefits and taking distributions from retirement accounts. Your Agent will be able to sign legal documents for you.

Advanced Health Care Directive

An AHCD lets you direct exactly what kind of medical care decisions your Healthcare Agent will make on your behalf if and when you can no longer make those decisions. It includes a HIPAA Authorization which allows your Healthcare Agents to communicate with medical personnel.

Final Disposition Authorization

A Final Disposition Authorization enables you to specify whether you want to be buried or cremated, the type of memorial service you want, such as a Celebration of Life (including choice of food and music), what words/prayers/poems you would like spoken, and who will be in charge of planning the event.

Legacy Letter/Voice Memo/Video

A Legacy letter is a way to leave memories, thoughts, reasons behind your estate plan design and final wishes to your family and friends after you become incapacitated or pass away. Because family members are able to read, watch, and/or listen to the philosophy behind your estate plan, it lessens the chances of litigation after your death. **This component of your estate plan helps you define and preserve the comprehensive legacy you leave behind.**

OUR MEDIATION OPTIONS

Ask for a complimentary mediation consultation

Integrative Mediation

Are underlying emotional upsets driving your family dispute?

When emotions are considered a central part of every dispute and are addressed with care, the efficiency of the mediation and the likelihood of reaching a cost-effective resolution are dramatically increased.

Integrative Mediation is a co-mediation model that **provides a holistic approach to conflict** resolution so that all aspects of the dispute can be addressed. **We support you** in uncovering the issues that held the conflict in place, so you are able to experience **deeper resolution** of the conflict. Our licensed Mental Health Professional and Lawyer team work together as neutral facilitators to help you separate your emotional and psychological reactions from the legal and financial facts.

**"Kamela is a great asset and resource to support difficult conversations. She is skilled at working with a pair of folks as well as facilitating potentially high-stress conversations in a group setting.
She is amazing at creating a comfortable environment where all participants feel supported and heard. She mindfully asks folks to agree to new expectations and desired behaviors so progress is felt and changes are more palatable."**

Dispute Resolution Coaching

With this **cutting edge coaching model**, you receive 1-on-1 support to deal with a conflict in your life more effectively (which is particularly useful when someone chooses not to mediate with you). Your Dispute Resolution Coach helps you gain clarity regarding how this conflict has been affecting you emotionally and what you need to move forward. As your Dispute Resolution Coach helps you **build empathy and understanding for the other person, new possibilities for progress and resolution emerge.**

After a Dispute Resolution Coaching session, most people report feeling **much more empowered to deal with the situation in their life,** even though the other person was never involved in the process!

Probate Mediation

Has your family already entered litigation due to an inheritance dispute or a will contest?

Instead of pitting one member of your family against another, **your family can choose to come together in a supportive space** so everyone can talk in an honest way. Our mediators encourage each of you to share your side of the story while your other family members listen. After needs have been heard, **our mediators support all of you to generate win-win solutions.**

"Kamela was extraordinary. She listened thoroughly, got a clear picture of what could really work for all of us, and then offered perspectives that could have each of us see the other's side more clearly. We arrived at solutions that worked for us and could not have done it without Kamela's capable presence."

OUR FACILITATION OPTIONS

Family Facilitated Conversations

We create a safe space to discuss challenging family topics.

Let's say there's no actual dispute happening in your family but you're facing some challenging questions like when to downsize your parents' home, when to move Dad into assisted living, or whether to sell or rent the family home now that Mom has died. With issues like these, **our skilled facilitators sit down with your family for a 3-hour facilitated conversation** in which each family member gets a chance to share his/her/their thoughts while the other family members listen without interrupting. Participation is voluntary, so only those who want to join in the process will. The facilitator manages the flow of the conversation so emotions can be expressed without overtaking the conversation in an unproductive way.

You will all be able to ask questions back and forth until **everyone's voice has been heard and understood.** Then, the highly capable facilitator assists your family to brainstorm solutions that take everyone's needs into account. During the process, you and your family members remain empowered to say what's working and what's not working at any time, so the Facilitated Family Conversation serves you all in the best way possible! By providing that safe space to discuss challenging topics, Family Facilitated Conversations aim to create **mutual respect, understanding, and connection.** Our facilitators are **committed to create win-win-win solutions for your family.**

Exclusively Online Facilitation and Mediation

As a modern and tech-forward firm, we deliver a convenient way to discuss challenging family conversations from the comfort of your home or office. Ask for our Exclusively Online Facilitation & Mediation services and we will host family facilitated conversations or a full-blown family mediation through our video conferencing platform. Everyone participates through their own device.

Imagine your family having a difficult conversation and coming to a win-win resolution through video conferencing. #Brilliant

OUR PROMISES

Complimentary Consultation
The first 20 minutes of our initial meeting is always a complimentary consultation carrying no commitment to work with us.

Full Trust Funding
We coach you through the process of funding your trust with all of your current assets.

Unlimited Calls
When you have a question in the estate planning process, call us without being nickled and dimed!

In-Home Appointments
We offer in-home appointments if you need to meet in your living room rather than in our office.

One Year of Free Changes
Ask us to make minor changes to your estate plan free of charge for one year after signing because we don't want you to stress out trying to get every detail perfect.

Yearly Follow-Ups
We will contact you once a year to ask if anyone has passed away, been born, married, divorced, bought or sold property, etc., in order to make updates to your estate plan.

Discounted Rate for Updates
If we draft your estate plan, you get 10% off our regular hourly rate to make updates to your original estate plan as circumstances in your life change (applies after the first year of free changes).

Reduced Rates Available
We reduce our rates for some clients with financial hardship because we're committed to people receiving quality legal services without money getting in the way.

Donations to Charity
We donate a consistent percentage of net proceeds to support restorative justice, ending human trafficking, and global peacemaking causes.

Satisfaction Guarantee
If you're not 100% satisfied at the date of signing your estate plan, we will make any changes necessary until you're completely satisfied.

Email us now to take a bold step towards building your legacy!

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