

Which plan fits which client

A one-page guide to our family plans and our founder work, and to when to send a client to which.
October 2026.

FAMILY PLANS

Three plans, built for different households

PLAN	WHO IT IS FOR	SEND A CLIENT WHEN
RLT Plan FULLY TAILORED TRUST	Homeowners, blended families, families with minor children, people with property in more than one place, and anyone with a business interest.	- The client wants to decide how and when children and other heirs receive assets, including through lasting trusts. - The household faces District of Columbia, Maryland, or Washington State estate tax, or a Maryland inheritance tax question. - A trust was signed but never funded, or the plan is several years old.
Standard Plan STREAMLINED TRUST	Married couples with straightforward wishes. A joint revocable trust, with assets passing to children in equal shares, outright.	- Both spouses want a trust and the situation is simple, with no lasting trusts for heirs and no child who would inherit while under 18. - Offered to married couples whose situation fits, confirmed before work begins.
Will-Based Plan FOUNDATION	A simple situation: wishes in writing, and trusted people named to act if the client cannot.	- Nothing in the client's circumstances calls for a trust. A will alone does not avoid probate. - If a trust would serve the client better, we say so and talk through a trust-based plan.

We confirm the fit with every client before work begins, and we move a client to the plan that fits. Fees are flat, scoped in writing before any work begins, with no hourly meter.

FOUNDERS AND EQUITY HOLDERS

When the client holds company stock

Send a founder early

Ideally before a priced round, a new 409A valuation, a tender offer, or an exit; as tranches approach the three, four, or five year mark; or before a move between the District of Columbia, Maryland, and Washington State.

What an engagement includes

A QSBS Qualification Review first. Then, only where the facts support each: a revocable living trust, a spousal lifetime access non-grantor trust, and a non-grantor QSBS trust. We tell you and the client when the stock does not qualify.

The QSBS Stacking Illustrator is free to share with clients. It runs in the browser and collects nothing.
vickeryl原因pllc.com/insights/qsbs-stacking/

WORKING TOGETHER

What stays with you, and how a referral works

You keep the return, the investment relationship, or the company's corporate work. We handle the trust and equity structure, scoped in writing, and with the client's consent we keep you informed.

1. Send a short note

With the client's permission: name, contact, company or situation, approximate stage, and the goal. No returns or cap tables yet.

2. Vickery Law replies

You will hear back within one business day.

3. A first call

Offered within five business days, with you included if the client agrees.

We do not pay or accept referral fees, and we do not trade referrals. Sending a referral does not create an attorney-client relationship.

Vickery Law PLLC

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