

ROBERT L. BERGSTROM

Attorney at Law

LEGAL SERVICES

PERSONAL PLANNING.

Education Funding.

Evaluate alternatives: like 529 College Savings & Prepaid Tuition Plans, Donor Savings, Direct Tuition Payments, Crummy Trust, Child's Trust, & Uniform Transfers to Minor's Account.

Help clients design their ideal college savings plan and draft documents to meet their goals.

Retirement.

Advice re taxation of withdrawals & distributions from 401ks, IRAs, and corporate pension plans.

Advice re requirements for rollovers and mandatory distributions from 401s, corporate pension plans, and IRAs. Roth IRA planning.

Marital.

Prepare Tenancy in Common, Joint Tenancy with right of survivorship, Community Property, and Prenuptial Agreements. Prepare gifting Deeds between spouses.

ESTATE PLANNING.

Wills & Trusts.

Prepare Simple and Complex Wills with Credit Shelter, Marital, QDOT, and Descendant's Trusts. Prepare Revocable Living Trusts with Pour over Will.

Prepare Irrevocable Life Insurance Trusts, Qualified Personal Residence Trusts, Grantor Retained Interest Trusts, and Charitable Remainder Trusts.

Limited Liability Company (LLC).

Determine your needs and create a customized LLC for your business or real estate holdings. Prepare accessory agreements like employment contracts.

Design an LLC that will facilitate gifting interests to your successor generation at a discounted value to reduce estate & gift tax liability.

Draft member cross purchase and company purchase buy-sell agreements.

Non-Probate Assets.

Help client's identify non-probate assets and who has been designated to inherit them.

Draft custom beneficiary designations for life insurance and retirement accounts to integrate them with your Will or Living Trust.

REAL ESTATE

Personal Real Estate.

Draft documents, and help close deals for the purchase & sale of primary residences, vacation homes, beach houses, country estates, and ranches.

Counsel regarding features & benefits of different types of mortgage loans.

Advice re utility services, septic tanks, community well systems, road maintenance agreements, well & septic tank covenants, home warranties, hazardous conditions, and dangerous trees.

Prepare deeds to convey property into Family LLCs, Living Trusts, and other trusts.

Drafted private roadway, shared driveway, utility, drainage, trail, and view easements.

Investment Properties.

Prepared purchase & sale agreements, and escrow instructions for small investment properties.

Prepared & reviewed notes & deeds of trust for seller and lender financing.

Negotiated and drafted leases, leases with options to purchase, and property management agreements for both landlord and tenant clients.

Prepare easements & covenants for shared access, parking, landscaping & street lighting.

Plan & coordinate installment sales, and 1031 exchanges.

Assist in the creation of a Limited Liability Company (LLC) to own your investment properties.

GOLD METAL CLIENT SERVICES

Defining Objectives.

Detailed Questionnaires for Estate Planning, and Retirement Planning.

Careful and sensitive interviews. Family Asset & Income Inventory.

Newsletter.

Publish a 4 - 8 page full color newsletter several times a year.

Contains articles on current issues affecting personal planning, estate planning, and real estate.

Colorful Graphs.

Create unique and colorful graphs, charts and tables that are used in the newsletter, client reports and presentations.

Our "Visual Estate Plans" are flow charts showing how the parent's wealth will flow through the next generations.

Instructions.

Easy to read owner's manuals for our wills, trusts, LLCs and other planning documents.

Instruction to Executor form on disc or hard copy where you fill in the blanks.

Convenience.

Convenient downtown Bellevue or Bothell office locations for client meetings.

Will also meet at a client's nursing home, or hospital room if necessary.

Manage document recording with the County Recorder & retain originals in our fireproof file.

PERSONAL INFORMATION

Employment History

1973-1978 Member of the Weyerhaeuser Company's Law Department, Tacoma

1980-2001 Private Attorney, Seattle & Eastside

Education

University of Washington BA Government

University of Washington Law School JD Top 10%

University of Pennsylvania Law School Community Service Program

Associations

Washington Bar Association

Eastside Estate Planning Council

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5400 Carillon Point • Kirkland, WA 98033

[425] 482-2564 • [206] 669-2790 • Fax [425] 650-9982
rbideas@verizon.net