



Casas Coaching & Consulting, LLC (C3)
Audrey Casas, Owner
Certified Legacy Planning Coach



Houston, TX
Horseshoe Bay, TX



832.496.2526



C3HSB@outlook.com



www.c3hsb.com

ABOUT

Audrey Casas is a transformational coach and accomplished healthcare executive who empowers clients to take charge of their legacy plans through a collaborative, client-driven approach.



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The process was very easy to follow. I liked the first brief session, detailing how things would go, then the next meeting to go over everything. Pulling all this important info together was quite the exercise, but so critical! I really felt great having completed this before my major vacation. It was a great experience!

-Customer R.H.

COMPREHENSIVE LEGACY PLANNING

OPPORTUNITY - AMERICAN FAMILY FACTS*

67% do *not* have a will

73% have *not* documented their celestial exit wishes

67% do *not* have a financial planner

40% cite procrastination as the reason for no plan

\$9 Billion unclaimed assets in Texas due to dormant bank accounts/safe deposit boxes & uncashed checks

\$178 Million unclaimed life insurance money in Texas

SOLUTION

Comprehensive Legacy Planning (4 key elements)

- Uncover core value, guiding principles, legacy aspirations
- Discuss strategies to prepare the heir for the estate handoff
- Create an ***In Case of Emergency (ICE) toolkit*** - a complete system to organize all aspects of life
- Establish goals to close any legacy planning gaps

VALUE PROPOSITION

- **Comprehensive System** – The ICE toolkit, a tabbed 3-ring binder, covers all aspects of personal life organization from financial and password inventory to legal documents and asset lists
- **Customization** – No one-size-fits-all system, rather, a customized legacy plan that will fit into virtually any home safe
- **Simplicity** – Easy to complete forms online. No messy handwriting to decipher. Hard copy and electronic PDF format provided
- **Supportive Coaching** – Audrey provides 1-on-1 coaching (~3 hrs), tapping into intrinsic motivation to complete the planning process
- **Professional Referral Sources** – Trustworthy legal, financial & tax referrals if needed. Guidance on homes safes, password managers

NEXT STEPS

Start creating a pathway to family resiliency today. Schedule a FREE 15-minute no obligation consultation via the web at www.c3hsb.com or email Audrey at c3hsb@outlook.com.



*According to a 2023 survey by Caring.com, 2022 survey by the Certified Financial Planner Board and Texas Comptroller Reports, 2023 and 2017