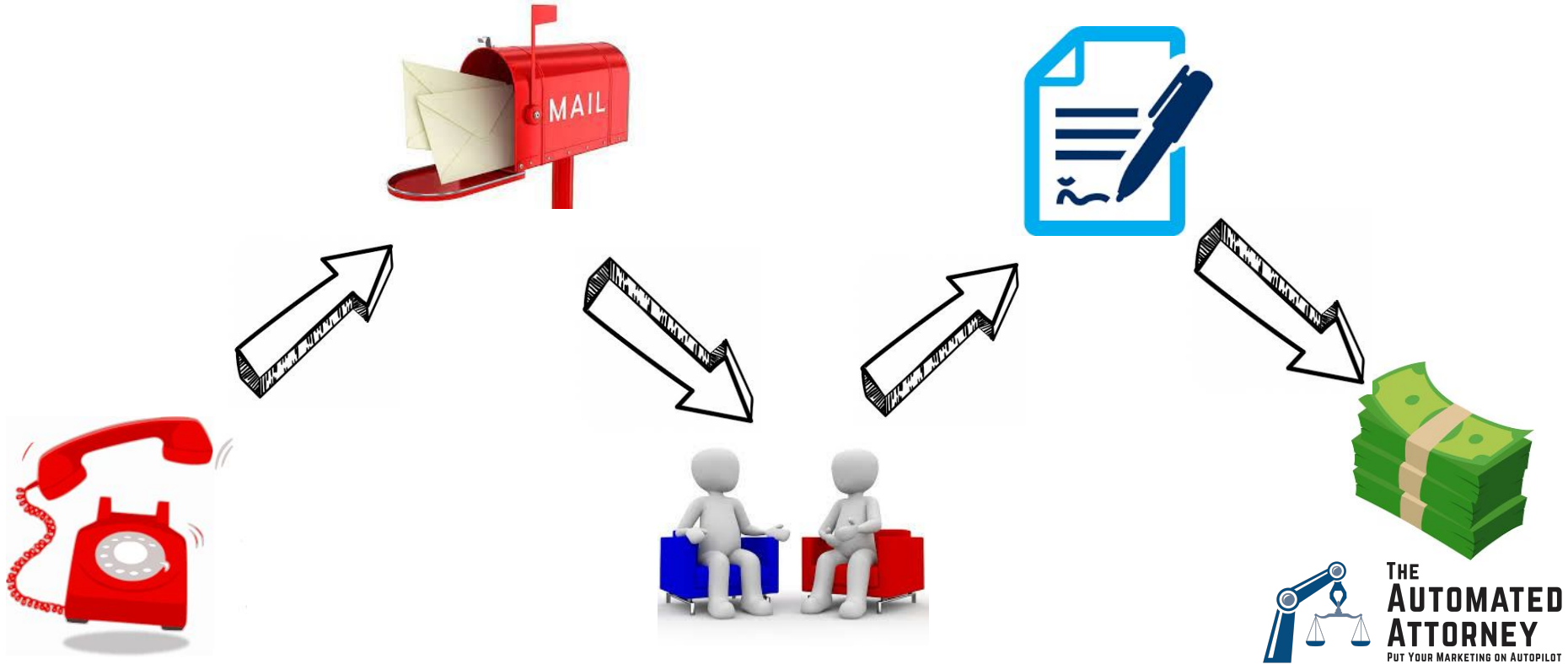


# Law Office Automation Tools

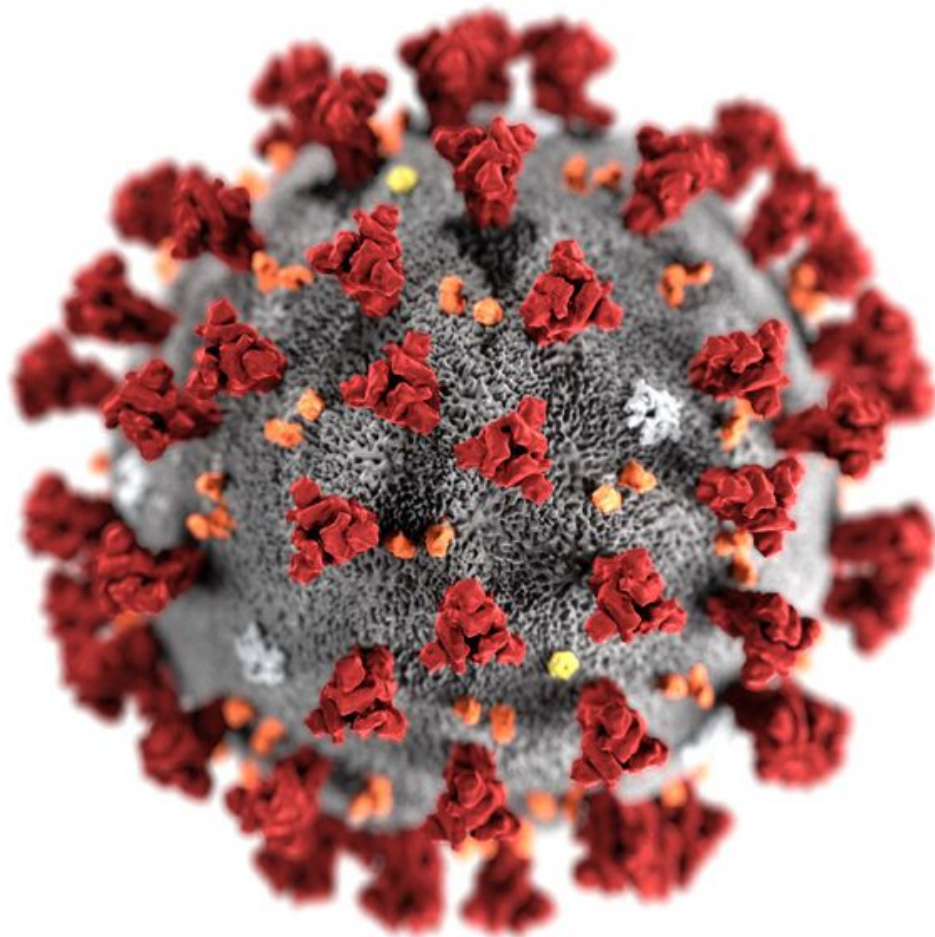
Ronald Morton, LL.M., CELA, CFP®  
[www.TheAutomatedAttorney.com](http://www.TheAutomatedAttorney.com)



# Business as Usual



Then ...



# Think Different

How we Meet Prospects

How we Transmit Information

How we Get Paid

How we do all this with Remote Staff

# Scheduling Links



Don't worry, your prospects won't see this message.



Meet with Ronald Morton

< September >

SUN	MON	TUE	WED	THU	FRI	SAT
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

How long do you need?

15 mins

30 mins

1 hour

What time works best?

UTC -04:00 Eastern Time ▾

5:30 pm

5:45 pm



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ATTORNEY**  
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## Confirm meeting

Monday, September 27, 2021 5:30 PM [Edit](#)

First name \*

Last name \*

Your email address \*

Please fill out this field.

Mobile phone number

What would you like to discuss on our call? \*

[< Back](#)

[Confirm](#)



# Your Calendar - Your Rules

Times Available

Time Between Meetings

Which Calendar

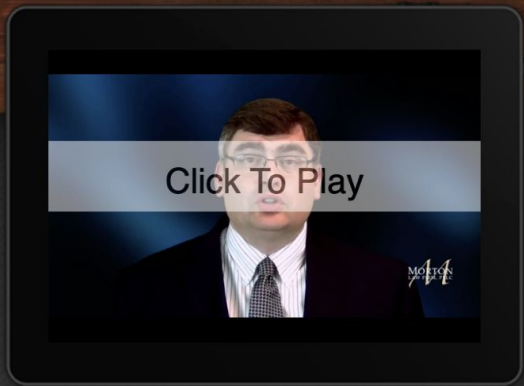
“Make me look busy”

Zoom Integration



# Pre-Meeting Education

Customized for the Desk of  
**Estate Planning**



**Asset Protection:  
Reducing Risks &  
Increasing Peace of  
Mind**



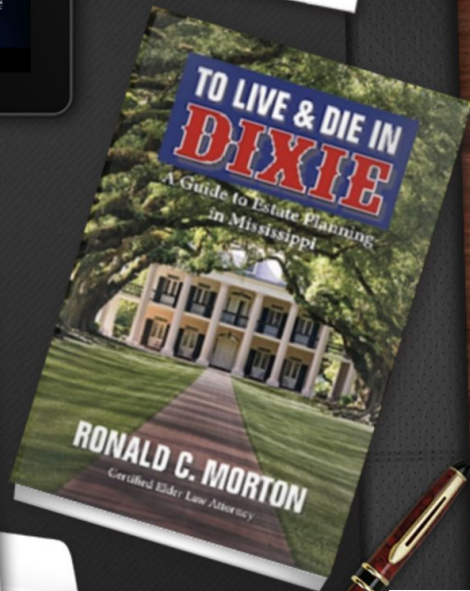
Dear Friend,

Thank you for your interest in Morton Law Firm. First, I would like to congratulate you on taking the initiative to learn more about ensuring the protection of your estate and therefore your legacy. Constructing a comprehensive estate plan is an extremely important and an extremely rewarding venture; you will feel an enormous sense of both relief and accomplishment once you have completed this process. If something happens to you and you have not at the very least made a will, the one that the state has already created for you (called the intestacy statute) will take effect, distributing your assets in a way that most do not find preferable or acceptable. Still, creating a will is not always enough. Sometimes, without professional advice, a will can have adverse effects, making the execution of your wishes difficult and convoluted.

Protecting your loved ones from an extensive and exhausting probate process can be swiftly achieved with the help of a professional like myself; I would love the opportunity to help you develop a plan that will protect you and your estate. Until then, I have provided for you some information about estate planning: If you click on the book to your right you will access a chapter from my book about the basics of estate planning. If you find the chapter helpful, the link at will allow you to receive a free copy of the entire book. Through the other attached brochures, you will find more information regarding the urgency of estate planning, how we can help you, as well as information about our firm. Please, reach out to us with your questions. I look forward to hearing from you.

Sincerely,

Ronald C. Morton  
Morton Law Firm, PLLC



## Probate: A Process, Not A Problem

MORTON  
LAW FIRM, PLLC



Click To Play



MORTON  
LAW FIRM, PLLC

Ronald Morton  
Morton Law Firm, PLLC

Phone: (601) 929-9797  
Email: rmorton@mortonlaw.com

## THE PROBATE BOOK

RONALD MORTON  
CERTIFIED ESTATE LAW ATTORNEY

A GUIDE TO ESTATE ADMINISTRATION  
IN MISSISSIPPI COURTS



MORTON  
LAW FIRM, PLLC

Dear Friend,

Thank you for your interest in Morton Law Firm. First, I would like to congratulate you on taking the initiative to learn more about ensuring the administration of your estate and therefore the protection of your legacy. If you or someone you know has had a loved one pass, you have heard about probate and it might have left a bad taste in your mouth. However, probate at its core is just a process and, like any process, can be maneuvered efficiently and painlessly with practice and guidance. Without help and preparation, navigating this process can be difficult, long, and exhausting. I do not want this for you. I would love the opportunity to help you navigate through the depths of probate.

In the meantime, I have provided you with some information about probate. Clicking on the book to the right of this letter will open a chapter from my book that explains what probate is and why it is necessary. If you find the chapter helpful, the link at the top of the page will allow you to receive a free copy of the entire book. Through the other attached brochures, you will find more information regarding the probate process, how we can help you, as well as information about our firm. Please, reach out to us with your questions. I look forward to hearing from you.

Sincerely,

Ronald C. Morton  
Morton Law Firm, PLLC

### A MESSAGE FOR YOU FROM RONALD C. MORTON, J.D., LL.M., C.E.A.



Dear friend,

I say "friend" because I truly hope that we will become friends and that the word itself conveys an understanding of trust. I hope I can share the following information

### WHO RELIES ON RONALD C. MORTON AND MORTON LAW FIRM



### MEASURABLE AND IMPRESSIVE RESULTS

The following are examples of real clients that we have had the privilege of helping at the Morton Law Firm. For reasons of confidentiality, names have been changed in these examples; however, the cases and results are real and presented to give you some authentic examples of the types of results we can accomplish together. Of course, legal services and results are specific to the individual client and outcomes depend heavily on the particular facts and circumstances.

# Questionnaire



## Data Collection



Electronic Signatures

File Uploads

Multi-Page Forms

Rating Scales

Repeating Sections & Tables

Save & Resume

Style Customization

## Logic & Automation



Calculations

Conditional Logic

Quantity Limits

Lookup Field

Notifications

Document Generation

## Security & Compliance



Two-Factor Authentication

Data Encryption

Data Protection & Privacy

Folder Permissions

ADA Compliance

## Integrations

Google Analytics

Microsoft Power Automate

Zapier

Integromat

JSON Webhooks



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# EL - Elder Law Questionnaire

## Personal Information Form

① Client ② Family ③ Health ④ Agents ⑤ Advisors ⑥ Assets ⑦ Doc(s)



Your Name

Name as you would sign a legal document

aka 'call me'

aka, alias, call me

DOB



*Signing name, e.g. Mr. John Q. Adams, PhD*

Prefix

Your First Name

Your Middle Name

Your Last Name

Suffix

Your Address

Address second line

City

State

Zip

Age

Place of Birth

Gender

Your County

U.S. Citizen

☒ Yes ☐ No

US Veteran

☐ Yes ☐ No

Dates of Service

Service Branch

Self-employed?

Even been self-employed?



Occupation

Income

Approximate Income Per Year

Home Phone

Work Phone

MobilePhone

Home Email

Work Email

Website

Social Security # (only if requested by attorney)



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# EL - Elder Law Questionnaire

Personal Information Form

① Client ② Family ③ Health ④ Agents ⑤ Advisors ⑥ **Assets** ⑦ Doc(s)

## Primary Residence Rent or Own?

☐ Own ☐ Rent

## Multistate Own Real Estate?

☐ In State ☐ Out of State

In which states do you own real estate?

## Real Estate



### Property 1

Type

Description

ID #

Address

Title %

County

Current Mortgage Balance

Value

+ Add Property

Total Real Property

\$0.00

## Banking



### Banking 1

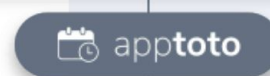
Type

Description

ID #



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# Code Triggers Reminder

Constantly Monitors Your Calendar for Code

Messaging Based on Appointment Date

If Appointment Moved - Message Is Moved - Automatically

Text Reminder

Email Reminder

Phone Reminder

Self-Confirmation & Cancellation

# Caution

If You Keep Canceled Appointments  
on Your Calendar, be sure to Remove  
the Code!

Post Meeting - They Engage



**DocuSign®**





Contacts

Actions ▾



Cindy Morton

Lifecare Planner

cindymorton@gmail.com



Note



Email



Call



Log



Task



Meet

About this contact

First name

Cindy

Last name

Morton

Email

cindymorton@gmail.com

Phone number

(601)925-9797

Mobile phone number

6015739330

Street address

8 middleton way 39056

City

Clinton

State/Region

MS

Postal code

-----

Search activities



Expand all

Collapse all

Activity

Notes

Emails

Calls

Tasks

Meetings

Filter by: Filter activity (1/32) ▾ All users ▾

July 2021

Workflow activity

Jul 9, 2021 at 10:20 PM EDT

Cindy Morton completed [Book Order from TV](#)

Workflow activity

Jul 9, 2021 at 10:20 PM EDT

Cindy Morton enrolled in [Book Order from TV](#)

This contact was created from Paid Social from Facebook

Sep 19, 2020 at 4:58 PM EDT

Search



Morton Law Phone Script

13 views • Last viewed 7 months ago

Workflow memberships (1)

Manage

Cindy Morton is a member of 1 workflow.

PandaDoc (1)

[delete sample](#)

Status: Viewed

Created: 1 month ago

Created By: Ronald Morton

Actions ▾

Create Document

Actions ▾



Powered by PandaDoc | eSignatures & More

YetiText (0)

Start Live Chat



Powered by YetiText

Help

**Quick access**

My templates



Shared with me

**Import From**

Local file



Google Drive



Dropbox



OneDrive



Box

**Open to edit**

Word (.docx)

**Template Gallery** ✨

Featured

Community Gallery

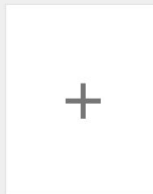
Agreements

More ▾

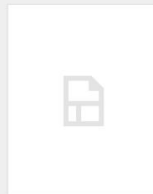
## Get started

**Drag and drop your file here**

Supported files: PDF, Word, PowerPoint, JPG, PNG

**Select file****Select a template**

Blank

Estate Planning Fee  
Agreement - ...Probate & Trust  
AdministrationEstate Planning Fee  
Agreement - Single

00185725 - RON



00200210 - RON

Retainer  
Agreement - ...

00200210

Estate Planning Fee  
AgreementProbate Fee  
Agreement...fee agreement -  
GeneralProfessional  
Services...

## Add recipients

This template includes roles, which help assign fields to recipients automatically.

Sender: **Ronald Morton**

Role: **Client - 1**

EMAIL\*

cindymorton@gmail.com

FIRST NAME

Cindy

LAST NAME

Morton



[See more fields](#) ▾

Role: **Owner**

EMAIL\*

rmorton@mortonlaw.com

FIRST NAME

Ronald

LAST NAME

Morton



[See more fields](#) ▾

Role: **Client - 2**

EMAIL\*

Search by name or email

FIRST NAME

LAST NAME



[See more fields](#) ▾

[+ Add recipient](#)

[Skip](#)

[Continue](#)

LEGAL SERVICES AND EXPENSES	Price	QTY/HRS	Subtotal
<b>Living Trust-Centered Plan</b> (Includes: Trust, Pour-Over Will, Durable Financial Power of Attorney, Health Care Power of Attorney, HIPAA Release, Advanced Directive & Designation of Guardian)	\$0.00	1	\$0.00
<b>Original Estate Plan</b>			
<input type="radio"/> Restatement	\$0.00	1	\$0.00
<input checked="" type="radio"/> Original Estate Plan	\$2,500.00	1	\$2,500.00
<b>Services</b>			
<b>Will-Centered Estate Plan:</b> (Includes: Will, Durable Financial Power of Attorney, Health Care Power of Attorney, Advanced Directive & Designation of Guardian) Spousal TSNT	\$0.00	1	\$0.00
<input type="checkbox"/> Spousal TSNT	\$0.00	1	\$0.00
Heritage Trust for Asset and/or Divorce Protection for Children	\$0.00	1	\$0.00
Retirement Preservation Trust	\$0.00	1	\$0.00
<input type="checkbox"/> Stand Alone Supplemental Needs Trust	\$0.00	1	\$0.00
<input type="checkbox"/> Testamentary Supplemental Needs Trust	\$0.00	1	\$0.00
<input type="checkbox"/> Sub-Trust Supplemental Needs Trust	\$0.00	1	\$0.00
Home Sweet Home Trust	\$0.00	1	\$0.00
*Additional Funding Fee	\$0.00	1	\$0.00
Design of an Asset Protection Plan (hereinafter referred to as "the Plan")	\$0.00	1	\$0.00
Qualified Income Trust	\$0.00	1	\$0.00
Legacy Trust for Medicaid Asset Protection	\$0.00	1	\$0.00
Patriot Trust for Veterans Asset Protection	\$0.00	1	\$0.00
Medicaid Application and Appeal through State Hearing	\$0.00	1	\$0.00
<b>Estimated Costs</b>			
<input type="checkbox"/> Estimated Costs - Home Deed (\$50 filing fee)	\$50.00	1	\$50.00
<input type="checkbox"/> Estimated Costs - Types of Vehicles Vehicles   Boats   Planes   Trailers	\$0.00	1	\$0.00
<input checked="" type="checkbox"/> Other real estate- In state	\$250.00	1	\$250.00
Other Real estate - out of State (Will obtain Quote)	\$0.00	1	\$0.00
<b>WE MUST RECEIVE COPY OF FILED DEED 2 WEEKS BEFORE SIGNING. IF MLF MUST OBTAIN COPIES, THERE WILL BE A \$300 ADDITIONAL CHARGE.</b>	\$0.00	0	\$0.00
Other	\$0.00	1	\$0.00
<b>Expenses will be computed and charged separately.</b>	\$0.00	0	\$0.00

TOTAL LEGAL FEES AND EXPENSES \$2,750.00

INITIAL PAYMENT \$0.00



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**Non-Refundable Flat Fee.** I understand that this agreement with MLF is a true non-refundable flat retainer fee, and is earned in full when work is commenced, including any plan design work which frequently begins at the initial client meeting. I understand that the fee is a flat fee earned when paid and is not contingent upon completion or execution of documents, time required, or charged hourly. I understand that I am paying for the skill and experience of the firm and am not paying for time expended in connection with this matter. This fee is charged and is paid as a true retainer, which is earned in full when paid and is not refundable. This true retainer secures Attorney's availability, time, and services, in as much as MLF limits the number of clients accepted, and further compensates attorney's intellectual property and work product which is disclosed to Client immediately upon engagement and prior to any documents being drafted. **Once work is commenced no refund is owed, even if the client dies prior to completion of services.**

**Post-Representation Involvement.** I understand that MLF's representation under this Agreement is completed upon fulfillment of the engaged services. Should the testimony or any other time of any MLF attorney or staff be required at any court proceeding, deposition, conversation, in any context, or to otherwise assist any person's preparation for such following completion of MLF's representation, including but not limited to (1) challenges, explanation, or inquiry into the validity of planning documents by heirs, fiduciaries, courts, or others, (2) determination of my intent, competency, or capacity, (3) any actions of Client, any fiduciary or beneficiary, or (4) any other reason, I obligate myself, my trust, and my estate to pay MLF's then current professional service hourly rates, secured by payment of estimated fees in advance, for all time spent by MLF whether as testimony, trial preparation, conversations with fiduciaries, beneficiaries or their representatives, or otherwise, regardless of whether such involvement is as a fact or expert witness, and including compensation for time incurred collecting this additional fee through probated claim, motion, court hearing or otherwise, including attorneys' fees incurred I collection. I acknowledge that MLF's post-representation involvement is not included in my original fee, is not standard practice, and that these additional fees for such later involvement are a material inducement to MLF's acceptance of this engagement and the fee I was charged, and that my current fee would be substantially higher if I, my trust, and my estate were not obligated to compensate MLF for all post-representation involvement.

**Cost and Expenses.** In addition to legal fees, Client will also be billed for any expenditure made on Client's behalf. Such costs might include recording documents with the recording office and filing fees.

**Disclaimer of Guarantee.** Estate law including Medicaid and tax laws change frequently. Nothing in this Agreement and nothing in MLF's statements to Client will be construed as a promise or guarantee regarding any outcome of Client's matter. Attorney makes no such promises or guarantees. Attorney's comments about the outcome of Client's matter are expressions of opinion only. I acknowledge that my planning **IS NOT** intended to protect my assets from availability for Medicaid or VA benefit qualification unless this box is checked. ☐

**Attorney's Disability or Death.** I understand that MLF may, from time to time, enter into contracts with other attorneys to ensure continuity of services to me in the event of the death or disability of the MLF attorney. In such event, I give permission to MLF to share confidential information about me with the Attorney assisting MLF and to permit the Attorney assisting MLF to provide legal services on our behalf.

\*\*\*If more than one client signs, each signatory is a client and enters into this agreement jointly and severally.

Select date 

By:

 Signature

MORTAN LAW FIRM, PLLC

By:

 Signature

CLIENT

By:

 Signature

CLIENT



# Getting Paid

**LAWPAY**<sup>®</sup>  
AN AFFINIPAY SOLUTION

**stripe**

# Post Meeting - They Don't Engage



# “No” only means - “Not Today”

Short Term Nurture Sequence

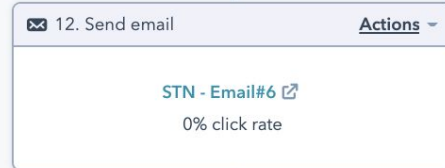
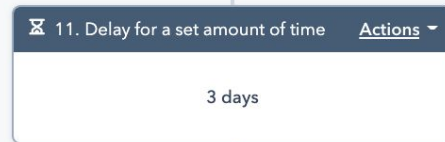
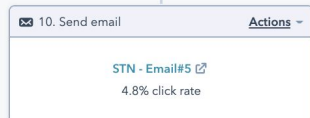
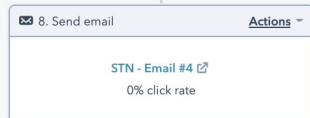
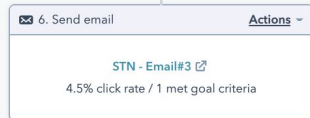
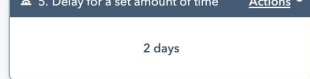
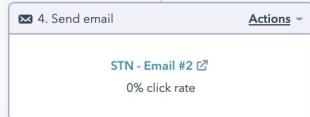
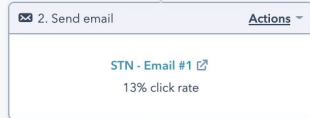
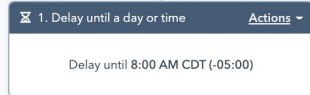
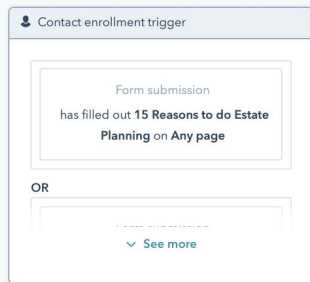
Prompted Follow-Up Calls

Follow-Up Text

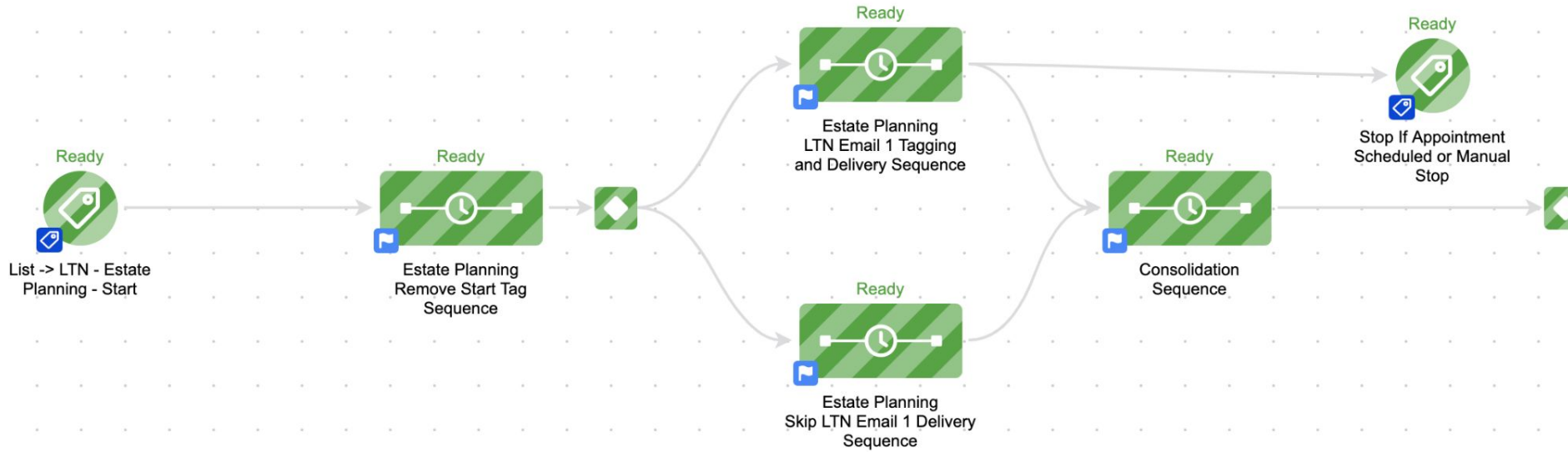
Snail Mail

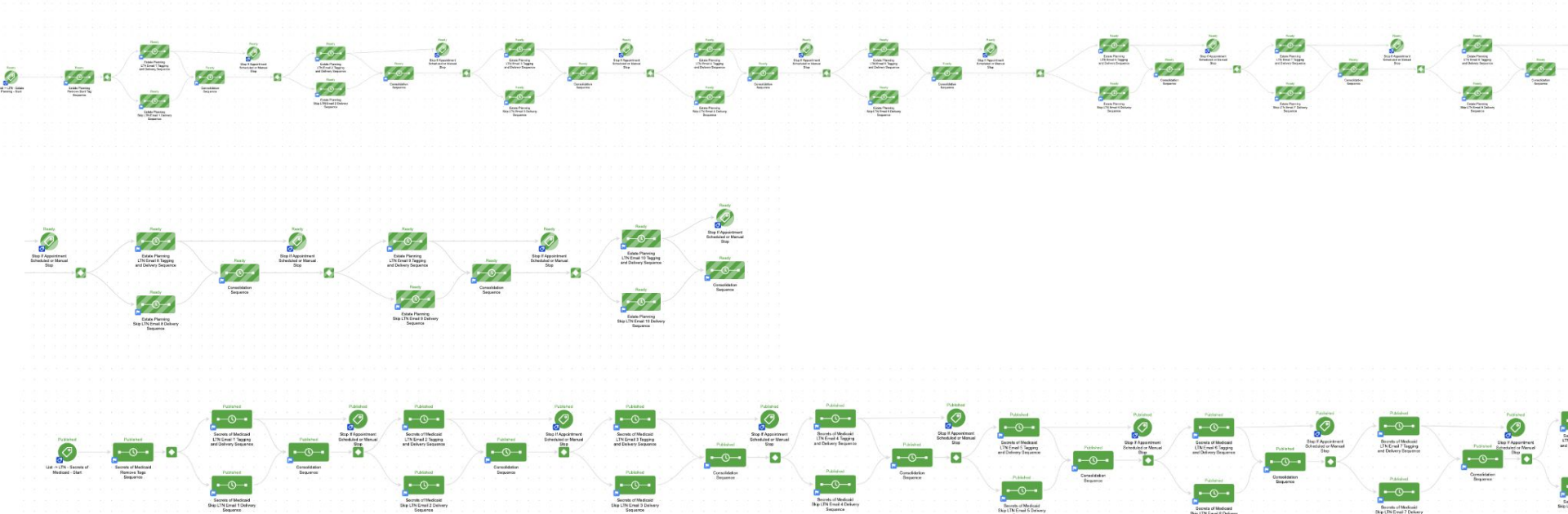
Event & Education Invitations

Long Term Nurture Sequence



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Contacts

Conversations

Marketing

Sales

Service

Automation

Reports

Asset Marketplace

Partner

Search

Morton Law Firm

Contacts

Actions

Ronald Morton

Morton Law Firm, P  
rmorton@mortonlaw.com

About this contact

First name  
Ronald

Last name  
Morton

Email  
rmorton@mortonlaw.com

Phone number  
(601) 925-9797

Mobile phone number  
6019559797

Street address  
402 E. Main St.

City  
Clinton

State/Region  
MS

Postal code  
39056

PCLC Status Dropdown

Appointment Scheduled with:

Lead status

Details

Search activities

Expand all

Collapse all

Activity

Notes

Emails

Calls

Tasks

Meetings

Filter by: Filter activity (1/32)

All users

July 2021

Workflow activity

Ronald Morton completed Book Order from TV

Jul 5, 2021 at 3:17 PM EDT

Workflow activity

Ronald Morton enrolled in Book Order from TV

Jul 5, 2021 at 3:17 PM EDT

Workflow activity

Ronald Morton completed Book Order from TV

Jul 2, 2021 at 7:43 PM EDT

Workflow activity

Ronald Morton enrolled in Book Order from TV

Jul 2, 2021 at 7:43 PM EDT

Workflow activity

Ronald Morton completed Book Order from TV

Jul 2, 2021 at 7:31 PM EDT

Workflow activity

Ronald Morton enrolled in Book Order from TV

Jul 2, 2021 at 7:31 PM EDT

Workflow activity

Ronald Morton completed Book Order to Firm

Jul 2, 2021 at 7:17 PM EDT

Workflow activity

Ronald Morton enrolled in Book Order to Firm

Jul 2, 2021 at 7:17 PM EDT

Workflow activity

Ronald Morton completed Book Order from TV

Jul 2, 2021 at 7:06 PM EDT

Website URL \*

By submitting this lead you confirm that all data provided is shared in compliance with applicable law and complies with HubSpot's Lead Registration Policy. Learn more

Request Registration

Playbooks (1)

Manage

Search

Morton Law Phone Script  
13 views • Last viewed 7 months ago

Workflow memberships (5)

Manage

Ronald Morton is a member of 5 workflows.

PandaDoc (0)

Create Document

Actions

Powered by PandaDoc | eSignatures & More

YetiText (0)

Start Live Chat

Powered by YetiText

Help

From Number

(601) 374-6988



Contact

Ronald Morton

Message

Hi, just following up on our conversation last week. Do you have any questions?



79 / 160

Send



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# The Text Conversation Can be Two-Way

**YETI TEXT**<sup>13</sup>

Messenger   Keyword Conversations   HubSpot Messaging

\$25.00

Conversations   +   🔍

Assigned: Chanley Henson   ⓘ

Mine   New   Team   Closed

Donna McDaniel Thanks (601) 441-0111	2 months ago	⚙️
Linda Alexander Hey Linda, this is Morton Law Firm... (601) 507-5093	3 months ago	⚙️
Edmond Jenkins Hey Edmond, this is Morton Law Firm... (601) 754-9412	3 months ago	⚙️
Michael Parks Hey Michael, this is Morton Law Fir... (601) 832-3338	3 months ago	⚙️
Tim Sullivan (601) 906-7298	3 months ago	⚙️
Bobbie Randolph Hey Bobbie, this is Morton Law Firm... (601) 260-5814	3 months ago	⚙️
Charles Henderson Hey Charles, this is Morton Law Fir... (601) 238-2515	3 months ago	⚙️
Cara Clock Good morning, this is Cooper from M... (662) 523-7064	3 months ago	⚙️
Friend Great (601) 540-8284	3 months ago	⚙️
<b>Joe Hartfield</b> Do I need to call you? (601) 467-4939	4 months ago	⚙️
Sharon James Ms. James, This is Cooper Gooden fr... (601) 441-2934	4 months ago	⚙️
Stan Caldwell Mr. Caldwell, This is Cooper Gooden...	4 months ago	⚙️

▼ Load More

following up from our seminar that you attended. I will be calling you soon to see if you are still interested in a free consultation. ✓

Cooper, I am still interested. However, I am assisting my father and there are many variables. So, I would like to have him with me when we speak. I plan to

take the next 2 days off work to help him gather paperwork. So, if we could talk Wednesday or Thursday of this week, that would be great.

He has Wednesday at 2 pm available or Thursday at 1:30 p.m. or 3:30 p.m. Would any of those work for you? ✓

Let's shoot for Wednesday at 2:00 please

Our 2:00 spot has been filled, but he could do 1:00 on Wednesday. ✓

Sounds good. Thank you

Sounds good. Thank you

Do I need to call you?

Claim

Assign

Joe Hartfield  
(601) 467-4939

email


lifecyclestage



Communicate with People using Their Preferred Method,  
Not Yours.



# Communicating with Leads



[Home](#) [About](#) [Practice Areas](#) [Policies](#) [Articles](#) [Seminars](#) [Resources](#) [Contact](#)

[\(601\)925-9797](#) [Email Us](#)

## Get Your **FREE** Report Now!

Three Reports Tell Secrets to Paying for Nursing Home Care

Simply enter your name and email to the right to get your 3 Free Reports that reveal little known secrets to qualifying for Medicaid without going broke.

*Plus, receive the Morton Law Firm email newsletter and alerts to upcoming education events absolutely free!*

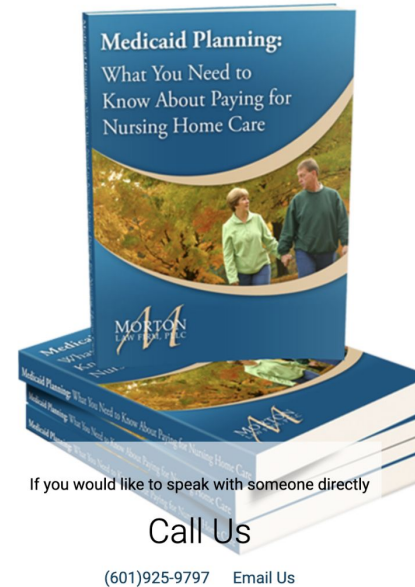
First name\*

Email\*

Phone number\*

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# Seminar Registration

## Free Estate Planning and Asset Protection Seminar



**Ronald Morton**

### Register Now!

Free Estate Planning and Asset Protection  
Workshops

**Tuesday, October 19 and Thursday, October 21**

Register Now! Space is Limited !

First name\*

Last name\*

Email\*

Mobile Phone (updates and reminders)

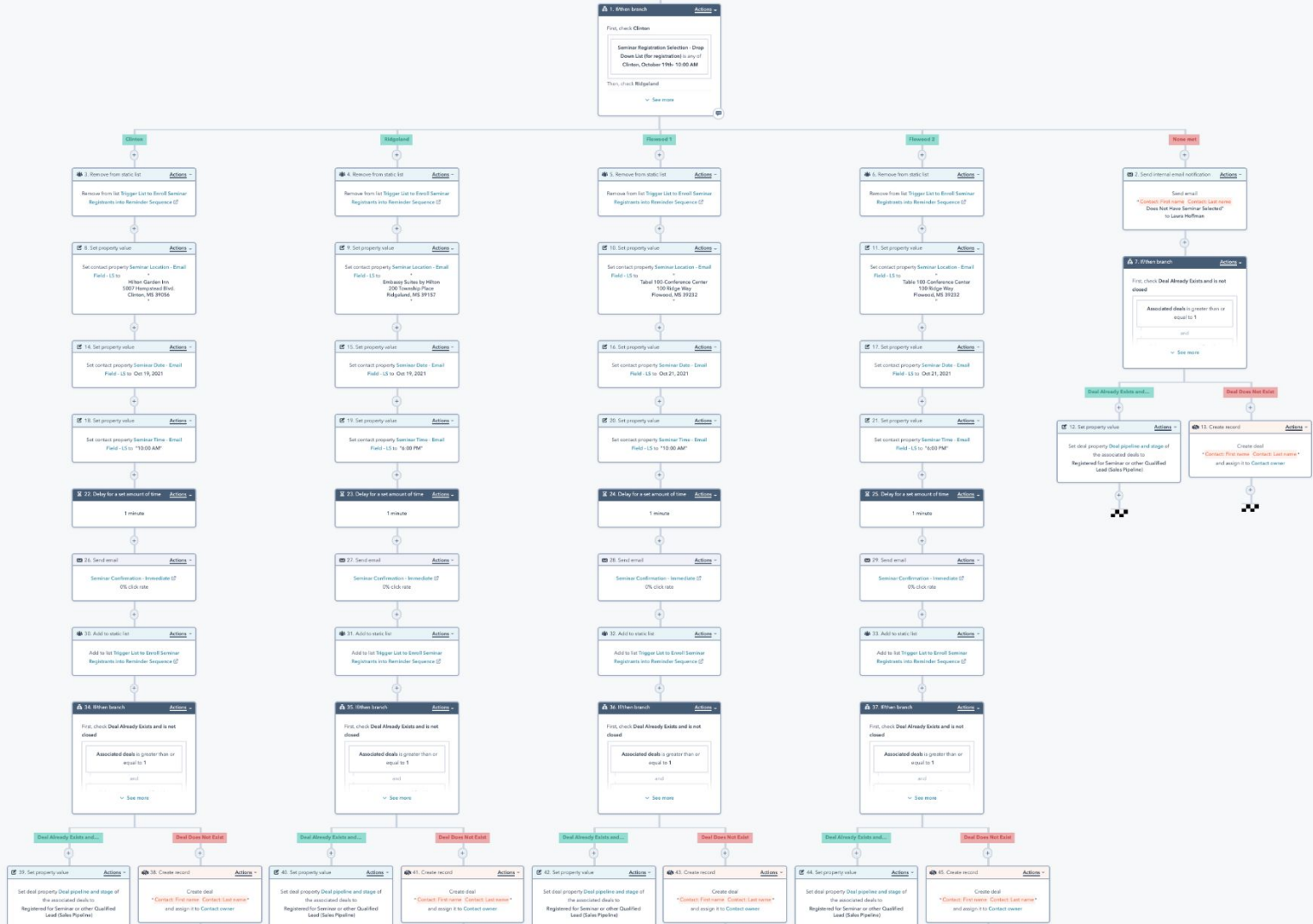
Seminar Registration\*

Number Attending

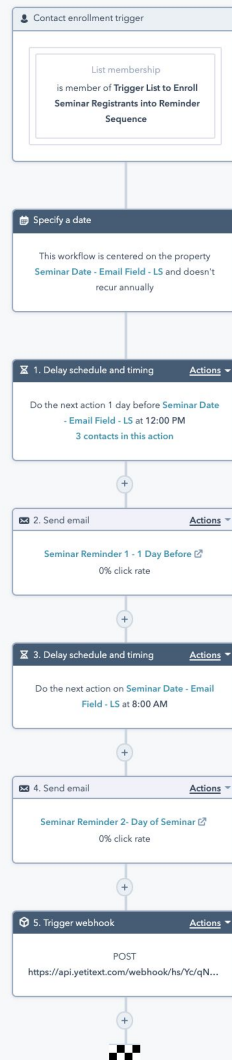
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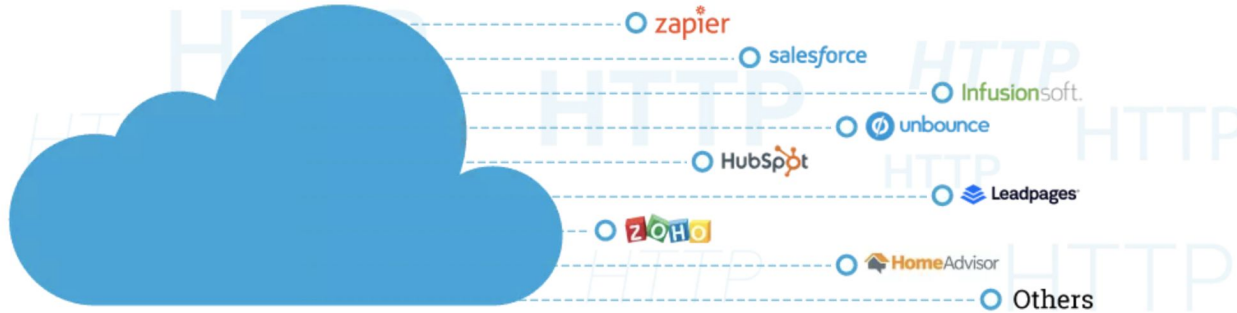


# Reminder Sequence



# speake<sup>2</sup>leads™

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## Get Your **FREE** Report Now!

Three Reports Tell Secrets to Paying for Nursing Home Care

Simply enter your name and email to the right to get your 3 Free Reports that reveal little known secrets to qualifying for Medicaid without going broke.

*Plus, receive the Morton Law Firm email newsletter and alerts to upcoming education events absolutely free!*

First name\*

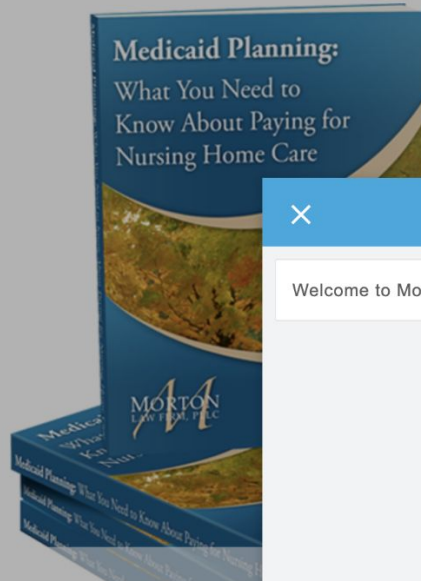
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If you would like to speak with

Call Us

(601)925-9797



Question & answer



Welcome to Morton Chat! What would you like to know.

Enter a question

## Get Your **FREE** Report Now!

Three Reports Tell Secrets to Paying for Nursing Home Care

Simply enter your name and email to the right to get your 3 Free Reports that reveal little known secrets to qualifying for Medicaid without going broke.

*Plus, receive the Morton Law Firm email newsletter and alerts to upcoming education events absolutely free!*

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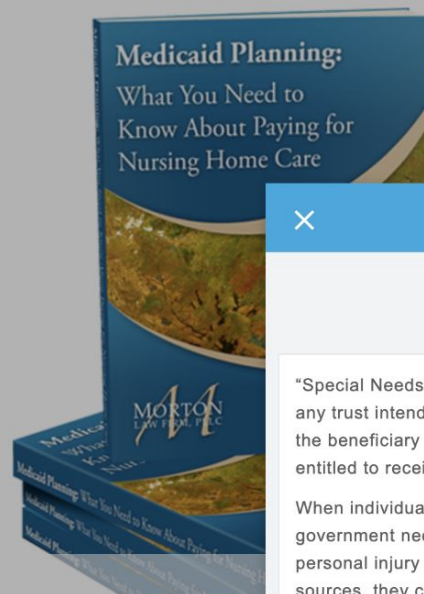
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Question & answer



What is a special needs trust?



"Special Needs" or "Supplemental Needs" describes any trust intended to provide benefits without causing the beneficiary to lose public benefits he or she may be entitled to receive.

When individuals with special needs who receive government needs-based benefits receive money from personal injury settlements, inheritances or other sources, they can lose their public benefits. You can structure your estate so that you provide assistance to your disabled child or grandchild without jeopardizing their receipt of benefits. This also can include a surviving spouse who may need Long-Term Care. Such a trust preserves those benefits and sets aside additional funds for the person with special needs. For a surviving spouse needing Long-Term Care, such a trust renders those assets non-countable for Medicaid qualification.

Enter a question

# Other Automation

# Graphics by Subscription



## Dashboard

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Brands &gt;

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## Dashboard

Good afternoon,  
Ronald



Queue Update  
Your queue is empty! Time for [another request?](#)



Ready for review  
2 requests



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Name your request to start the process.

Request name

**Pickle Tip:** Include a design type in your name, such as flyer, t-shirt, facebook ad, etc.

**Example:** Thanksgiving Dinner Flyer

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You have one or more saved drafts in your queue.

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**Just Stop It!**

Click below to resume this draft, or go to your draft queue to view other saved drafts.

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Delivered

Your Drafts

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Download Files ✓ Mark Complete Duplicate

**Summit Postcard**

Request #1184950 | Via Website | Delivered 09/16/2021 01:51pm CDT

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Welcome, Ronald

All



Service requests

1

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Get started and create your first request.

Create request

# Biden's New Tax Hike threatens the Savings of Millions

## Biden's New Tax Hike threatens the Savings of Millions

Created: 2021-09-17 00:02:00

### Description

The house just passed a new spending law that raises many taxes. I need a video script that explains what is in the new law as it relates to tax increases on wealthy individuals, and what they should do now.

### Project Type

Social Media Copy

### SEO Keywords

Word Count (If none selected, default is 800 Words)

1200 Words (3 Business Days)

Would you like your writer to add a free stock photo to use with this content?

No

We love inspiration. Share links to relevant information and/or examples of writing you like

### Assigned to



### Status

Completed

### Due date

Sep 22, 2021

### Following



# Biden's New Tax Hike threatens the Savings of Millions

Hi there,

Welcome, and thank you for joining me today. Today, we're going to discuss Biden's new tax hike and what that means for us. Is this change helping or hurting the economy? And more importantly, is it helping or hurting the individual?

What is the new tax hike?

Firstly, let's go over what this new law entails, in order to get a better understanding of what we can expect moving forward, as taxpayers.

On September 13th, 2021, house democrats outlined a myriad of tax increases on corporations and wealthy individuals to fund an investment in the social safety net and climate policy that could reach up to \$3.5 trillion.

This plan proposed an increase of top corporate and individual tax rates of 26.5% and 39.6% respectively. It also includes a 3% surcharge on any individual income above \$5 million and a capital gains tax of 25%.

However, nothing is set in stone. As of right now, it's unclear how much the tax increase would raise, or if the new revenue would offset the full investment in social programs.

At the time of the proposal, it was not solidified as to how much the tax proposal would change when it came time to make the final vote. \$3.5 trillion is not only a lofty goal but one that centralists would likely give opposition to.

Plus, the party will need votes from every member of the Senate Democratic caucus, and all but three House Democrats and some Dems are already voicing their concerns. For example, Sen. Joe Manchin, D-W.V., has called for a corporate rate of 25%, lower than the one favored by House Democrats.

In the days since the proposal, the House Ways and Means Committee has approved a major portion of the \$3.5 trillion social spending package. This includes provisions that would raise taxes on wealthy individuals and corporations.

Expanding infrastructure financing tools.  
Expanding the low-income housing tax credit.  
Extending and expanding renewable energy tax credits.  
Expand the government-funded social safety net by providing free community college.  
Establishing universal pre-kindergarten.  
Bolstering care for elderly and disabled Americans.  
Give tax credits to low- and middle-income families.

Ultimately, democrats see the social spending package as an opportunity to advance President Biden's economic agenda and make long-sought investments in order to strengthen the social safety net and combat climate change. Senate Majority Leader Chuck Schumer, D-N.Y., and House Speaker Nancy Pelosi, D-Calif., aim to pass the legislation through the budget reconciliation process without Republican support.

However, the top Republican on the committee, Rep. Kevin Brady staunchly opposed the bill, criticizing the proposals in its final stages, and expressing concerns about inflation.

Republicans offered a ton of amendments that highlighted portions of the bill that they disagreed with, but it appears that none of them were adopted.

So what does this mean for wealthy individuals moving forward? Should you expect a large spike in your taxes in the coming years?

It's important to note that this bill is still an ongoing discussion among Democrats and Republicans in office. A finalized law is still in the works and any final bill that becomes law will need to receive the support of both the House and Senate democrats. This may sound reasonable, especially considering that this bill pushes the democratic agenda, but there are a handful of Democrats that have their own thoughts when it comes to taxes and spending.

In the wake of the proposal, the Joint Committee on Taxation (JCT) estimated that the tax increase would primarily affect households earning \$1 million or more each year. Households earning under \$200,000 would see a decrease in the near future, and certain middle-income families might see a slight increase.

According to this bill, a "wealthy" individual is someone in America who earns \$400,000 or more a year. However, there is evidence to suggest that this number is arbitrary, rather than a solidified threshold.

As it appears, if President Biden's bill is accepted as is, the wealthiest pocket of America can expect to pay the most taxes. .01% of Americans, or those earning either an individual or combined income of \$3.6 million dollars or more a year can expect to pay an additional \$1.56 million dollars a year in taxes. This means that their after-tax income would plunge by about 16.8%.

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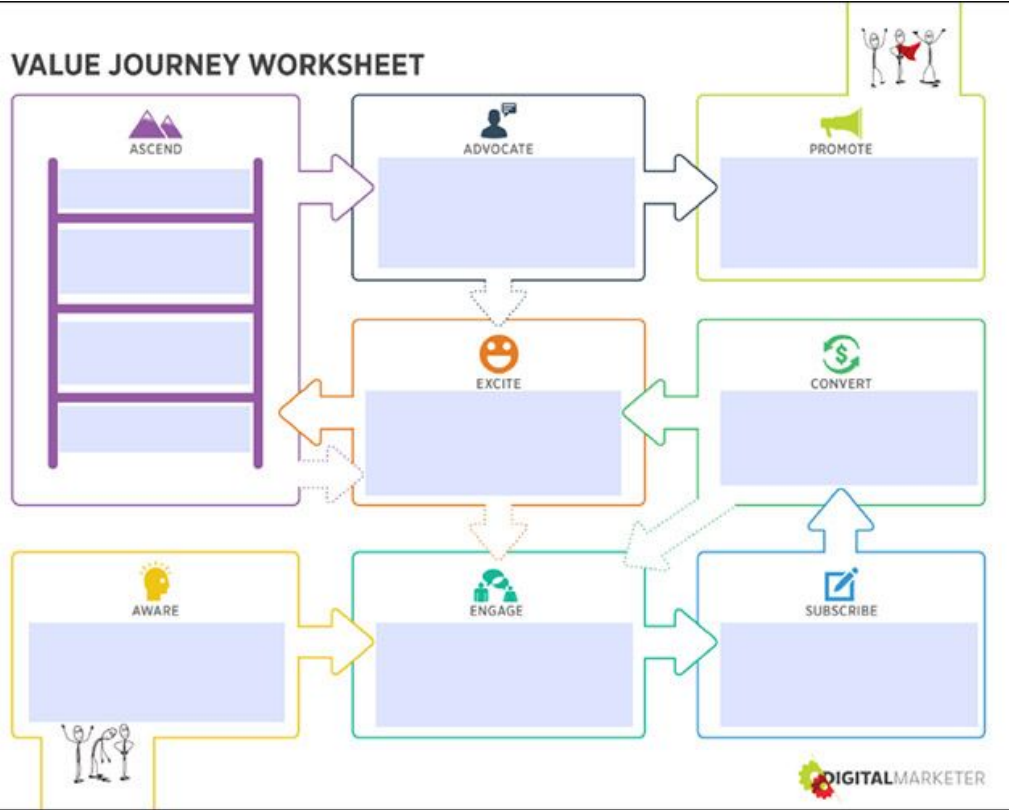
# A.I. Written Content

<https://www.jarvis.ai/>



# Client Value Journey Workshop

Building Systems to Move People from Prospects to Raving Fans.



Friday, October 8, 2021  
Noon - EST

No Charge

Text **Digital** to  
**601-374-6988**

# Slide Deck & Resource Links

Text **Digital** to  
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Ronald Morton  
[rmorton@theautomatedattorney.com](mailto:rmorton@theautomatedattorney.com)



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