

Estate Planning For Families With All Size Estates

Due to their desire to protect their growing family, Bob and Betty needed to address a number of areas. They wanted to be certain that each spouse and the children were protected in the event of either's death or disability.

Because of changes to Federal and State laws over the past 30+ years, and due to development in the Estate Planning profession, the choices available today for Bob and Betty – and for you - to solve Estate Planning issues are much more extensive than in the past.



YOUR MAIN CHOICES IN THE PAST

ESTATE PLANNING
Will Trust

YOUR MAIN CHOICES TODAY

ESTATE PLANNING
Pour Over Will Living Trust Estate Planning Letter Financial Power of Attorney Health Care Power of Attorney Healthcare Directive (Living Will) Family Limited Partnership Life Insurance Trust Buy-Sell Agreement Limited Liability Company Family Private Foundation Asset Protection Trust Etc.

However, key to accomplishing anything great is to take the first step. That's where the Basic Estate Plan comes in. It takes 2 appointments to accomplish this. One to review your needs. The second to execute the documents.

The documents we include in the Basic Estate Plan may be all that you need or want to do. Indeed, many clients find this is all they

need to do. For that reason, what follows is a discussion of the 6 documents we include in most Basic Estate Plans. This is recommended for small, medium, and large Estates, as well as for simple and complex Estates. Later in this Guide is a discussion of additional choices for large estates and special situations and objectives.

It's important that all parents and grandparents "begin with the end in mind". We all want to protect our families. Let's start at the beginning and let's be certain that we do not overlook even the most obvious situations.

Where To Begin?
(for all Parents and Grandparents –
Small Or Large Estates)



First Step In Famous = **"Catch Rabbit"**
Rabbit Stew Recipe

Don't Overlook The Obvious

<i>To Do List</i>
✓ _____
✓ _____
✓ _____
✓ _____
✓ _____