

Introduction To Estate Planning

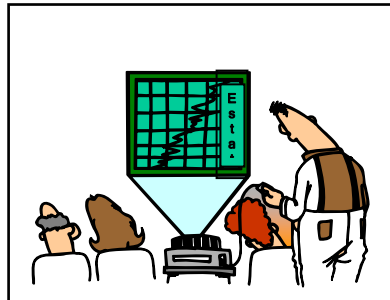
When Bob and Betty* came in to see me, they just wanted to make sure everything was taken care of if something happened to one or both of them. Bob, who had developed a logistics specialization from his time in the military, owned and operated a very successful distribution business. The company had recently extended its business model into an internet-based distribution and fulfillment business.

Betty, who had an MBA from Creighton University, helped in the business by managing their ongoing business model-based strategic planning. She had also handled most of the duties on the home front, in raising their three children – Jack, Joe and Jane. Jack was now married with two children of his own. He was working full time in the business. Joe was in college and hoping to also join the family business. Jane was still in high school.

Bob and Betty were seeking peace-of-mind. They wanted their Estate Planning taken care of. But they weren't sure where to start.

This Guide doesn't pretend to answer all possible questions on Estate Planning. Instead, it is intended to be a quick and easy book to read which will help you to be aware of the principal tools available today to protect yourself, your family and your estate.

Most of all, this book is intended to help you to take a look at your personal, financial and legacy objectives (such as those in the Appendix) and to take the actions you need to take to meet them.



- To Straighten Out Misconceptions About Estate Planning



- To Show What You:
 - Need To Know
 - Should Do

*While the examples mentioned in this book are based on actual clients' situations, the names and certain facts have been changed in order to protect their privacy.