

Estate Planning

These are some common legal instruments that I employ to accomplish your estate planning goals:

TRUSTS

Used to avoid probate proceedings, minimize estate taxes, and accommodate numerous situations.

TILTING OF ASSETS

You can title assets in your name, or in your trust's name. This gives us tremendous flexibility in estate planning.

WILLS

These are legally binding documents that tell the probate judge how your assets are to be distributed.

DURABLE POWER OF ATTORNEY

You name a loved one as your agent to act in your absence or incapacity regarding all financial matters.

ADVANCED HEALTH CARE DIRECTIVES

You state your wishes regarding medical treatment, and name an agent to see to their fulfillment.

FAMILY LIVING TRUSTS

Family living trusts address what should happen to your minor children if you and your spouse die. This trust is set up in advance to receive the estate assets, which would then be used to provide for your children's needs. The children would receive payouts of principal upon reaching certain milestones of majority. If you fund the trust during your lifetimes, it acts as a vehicle to avoid probate.