# ESTATE PLANNING

## Overview

### Protect your loved ones with a carefully considered plan

You work hard over your lifetime to build assets and financial security, but what happens after you pass? While estate planning should be a priority, it is ignored or delayed in many families, often at the cost of emotional and financial burden to loved ones.

Our team works with you to carefully craft – and update over time – an estate plan that aligns with your goals and wishes, protects your family, and maximizes the long-term impact of your wealth.

Estate planning can be quite complex. We will help you assemble a broad plan that incorporates the strategies, processes, and documents appropriate for your situation. These include:

- Last will and testament
- Appointment of guardian for children
- Declaration of guardian during incapacity
- Statutory durable power of attorney
- Medical power of attorney
- Directive to physicians
- Revocable trust
- Irrevocable life insurance trust
- Family limited partnerships
- Beneficiary designations
- Annual gifting strategies
- Wealth transfer strategies
- Minimization of estate taxes

While discussing your estate can be emotional, it is one of the greatest services you can undertake for your loved ones. Let us help you through the many decisions you face to help ensure that your assets are distributed as you wish.

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