

An Important Gift You can Leave for Your Family is An Estate Plan

Estate planning can help you think about who will inherit your home, portfolio and family heirlooms. But estate planning is much more than tangible properties.

From decisions about your health, finances, and legal commitments to protecting and fulfilling obligations to your family, a detailed estate plan can be a thoughtful and generous gift to your loved ones. They may be grateful of your way of expressing love.

Taxes

If your family's estate is not currently subject to federal estate and gift taxes, it may be in the future. It is important to work on a strategy to help protect against changes in the tax law. Taxation schemes may be different with the type of assets or the citizenship or residency of the heir.

Beneficiary Designations

Don't forget to keep beneficiary and trustee designations up to date -especially if you had life changes like a new marriage or divorce.

Your estate includes: Aircrafts, Annu ties, Arts, Bank Accounts, Boats, Bonds, Business Interests, Cash, Cars, CDs, Digital Assets, ETFs, Guns, Inherited Valuables, Jewels, Life Insurances, Managed Money Programs, Mutual Funds, Notes Receivables, Pets, Real Estate, Retirement Plan Assets, and Stocks, in alphabetical order, and more.

This information is not intended to be a substitute for individualized for tax, estate planning and legal advice. Please consult your legal and tax advisors for your specific situation.



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