



national estate planning awareness week

October 20, 2014

This week is National Estate Planning Awareness Week.

It is a common misconception that only the very wealthy need estate plans. This may explain why 55% of Americans do not have estate plans. However, the truth is that everyone needs an estate plan.

Estate plans help individuals and families transfer wealth in an orderly and tax-efficient manner to their loved ones and charitable organizations. Estate Plans also enable individuals to designate someone to take care of their minor children, manage their assets, and make health care and personal care decisions for them if they ever become unable to do so for themselves. If individuals and families fail to plan ahead, a court will make these important decisions for them.

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trusts & estates