



Three Keys To Successful *Estate Planning*

Does “Estate Planning” Make You Uneasy?

Many people are uncomfortable with the prospect of estate planning. They worry about what is involved in developing a proper plan and the complexities. What if they miss something or make a mistake that foils their intentions? Most of our clients come to us with the same questions and concerns ...

- How do I make sure my loved ones are taken care of?
- Can I protect the inheritance I leave from creditors, divorce, or other problems?
- Am I leaving too much? Are my bequests manageable?
- Could my investments become eroded by poor decisions?
- Will taxes and fees take too big a bite out of my estate?
- What if my assets and estate become a matter of public record?
- Can the settlement process be simplified so it doesn't drag out unnecessarily?

These are critical questions. Fortunately, they can all be answered through the creation of a comprehensive estate plan. Make sure your loved ones receive the full benefit of your life's accomplishments. *It is not just a matter of your wealth and assets ... it's a matter of your legacy!*

You Need a Team

At Minto Law Group, LLC, we understand the importance of giving each client individualized, family-focused planning services. We also understand the critical need for fostering long-term relationships with our clients and their other trusted advisors.

Let's face it, estate planning can be confusing, with numerous questions and many unknowns regarding investments, wills, insurance, trusts, taxes and bequests. Teamwork is critical to making sure all of your needs and concerns are addressed, both now and for the future.

Estate planning is *not* something that can just be done once and forgotten about. Your circumstances and needs are going to evolve and change over time. Your estate planning team should work with you over time, and bring fresh thinking and sound advice to the table, whether it is a question of setting up your initial plan or reviewing your changing needs down the road.

You Need a Plan that Works

We do not think creating an estate plan is difficult, but it *does* require the involvement of all your professional advisors: your attorney, your accountant, and your financial and insurance advisors. If all the professionals are included in the planning, you are much more likely to have a plan that works. If not, you may receive conflicting advice that leads to confusion and inaction.

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