

Estate Planning

Estate planning on your own can be complicated and costly. And the list is endless... state taxes, bureaucracy, probate courts, unfair appraisals, health care concerns, eligibility of heirs, life insurance, IRA's, 401K's, annuities, burial or cremation costs, and intent regarding death-postponing treatment to name a few. Not knowing your legal and financial rights often ends up costing you more in the end.

You may feel that you're too young to care about estate planning. Or, perhaps the reminder of death makes you uncomfortable. You might be tempted to put the whole thing off, assuming that it will just take care of itself. In all cases, estate planning ends up saving your family lots of time, heartache and money.

Planning what happens to your estate when you're gone can seem frustrating and intimidating without qualified help.

At every step, we'll be there with you.

- Clearly define your estate planning goals.
- Organize and create your estate planning team (experts on law, finance, and taxes) if you need one.
- Evaluate and recommend estate planning options.
- Prepare, organize and review your estate planning documents including current wills, trusts, health care and power of attorney.
- Decrease the problems and expenses associated with probate.
- Lessen taxes at time of death.
- Arrange for management of your estate in the event you are incapacitated.
- Draft a working plan for conserving and effectively managing your estate after death.
- Transfer the assets of your estate to heirs the way you want.
- Organize fair and adequate liquidation of estate to cover taxes and other expenses.
- Amend your plan as needed.

You also get help with...

- Living Wills and Trusts.
- Lifetime Family Wealth Transfers.
- Family partnerships and other business relationships.
- Leaving money to charities.
- Preparation for estate and trust tax problems.

Please contact us to schedule an appointment at 734-471-3161 or E-mail us at info@pfaltd.net