Estate Planning Process

Discovery

- Goals
- Family circumstances
- Financial picture
- Concerns (what “keeps you up at night”?)
- Vision for your (and your family’s) best future
- Advisors- Financial advisor, CPA, Insurance Agent, Banker, Other

Plan

- Tax reduction strategies
- Protecting your assets
- Protecting your children’s inheritance
- Facilitating decision-making by others in your absence
- Providing for your spouse’s financial future
- Reducing court involvement in asset management and transfer

Implement

- Execute before witnesses, Notary Public
- Arrange appropriate storage
- Notify appropriate persons
- Align beneficiary designations life insurance, retirement plans

Monitor

Systems in place to renew Discovery, Planning, and Implementation due to:

- Deaths
- Divorce
- New assets
- New risks
- Births
- Relationship changes
- Other

STEWART LAW, P.A.