What is Simple Estate Planning?

Long-Term Care & Protecting Assets

You are not only concerned about how things are handled after death or who will speak for you if you become ill. You want to protect and preserve your assets from medical expense and the costs of long-term care during your lifetime.

Managing Estate Taxes & IRA Accounts

Your estate may be at risk of estate taxes or it may include a significant IRA, 401(k) or other retirement account that carries significant income tax consequences for your heirs. Your heirs will benefit from planning that reduces, delays or eliminates these tax burdens.

Avoiding Probate

Knowing that your estate will be distributed to your heirs according to your plan is just the beginning. You also want the process of handling your estate to be private, quick and efficient. Using a Revocable Trust rather than a Will avoids probate and court proceedings after death.

Special Assets & Family Situations

At death your assets will not simply be sold and distributed equally to your heirs. Special situations need to be addressed with a unique asset that must be handled in a certain way, a beneficiary who's share of the estate can not be treated just like everyone else or a desire to protect the inherited assets from creditors or other dangers down the road.

Gold Star Estate Plan[™]

You have complete and well-coordinated documents handling all of the key issues regarding your assets and affairs if you are incapacitated or die, including Wills, Trusts, Power of Attorney, Beneficiary Designations and the other aspects of estate planning.

Financial Power of Attorney & Healthcare Power of Attorney

You choose who will handle your money and speak to your doctors if you are ever incapacitated.

Simple Will

A document that tells us who receives your assets after death and who will be in charge of the day-to-day affairs of your estate.