



10 QUICK TIPS THAT THE ESTATEPLANESQ WANTS YOU TO KNOW:

1. EVERYONE OF US HAS AN “ESTATE” WORTH PUTTING A PLAN INTO PLACE.
2. IF YOU DO NOT HAVE A WILL THAT IS CALLED BEING “INTESTATE”. YOUR PROPERTY WILL BE DISTRIBUTED FOR YOU
3. A “SIMPLE” WILL CAN BE VERY DANGEROUS
4. ESTATE PLANNING INVOLVES TAX LAW, CORPORATE LAW, SECURITIES LAW & PUBLIC BENEFITS LAW IN ADDITION TO PROBATE LAW
5. ESTATE PLANNING HAS TO BE ABOUT LONG TERM CARE PLANNING OR THERE MAY BE A LOT LESS TO LEAVE (OR NOTHING AT ALL) TO TRANSFER AT SOMEONE’S DEATH
6. GIVING ANYONE A DURABLE POWER OF ATTORNEY IS POTENTIALLY DANGEROUS
7. WILLS USUALLY DO NOT CONTROL ASSETS THAT PEOPLE HAVE AT DEATH
8. FINANCIAL INSTITUTIONS OFTEN DO NOT HONOR DURABLE POWER OF ATTORNEYS.
9. LEAVING THINGS FOR CHILDREN TO SHARE EQUALLY MAY NOT EQUATE TO FAIRLY
10. GEORGIA IS A STATE WHERE IT IS POSSIBLE TO DISINHERIT YOUR SPOUSE