The 10 Big Protections Through Proper Estate Planning



Estate Planning is not just about your assets, it's also about protecting your loved ones. Protection from what?

Government Interference.

Without proper planning, it is very likely that the courts will be involved in the decisions regarding your person and assets.

Incapacity.

If you became incapacitated, who would make decisions for you & what would those decisions be?

Remarriage.

If you are married, and you are the first spouse to die, would your children's inheritance be protected if the surviving spouse were to remarry?

Blended/Mixed Families.

If you are married and you have children from a prior relationship, how can you make sure that your children inherit your assets?

Creditors.

If any of your children had creditor issues, how can you protect their inheritance from claims of creditors?

Divorce.

If any of your children got divorced, how can you protect their inheritance from their ex?

Financial Immaturity/Addictions.

If any of your children are financially immature, or had some type of addiction, how can you protect their inheritance from themselves?

Special Needs Child/Dependent.

If any of your children or dependents had special needs, how can you still leave an inheritance for them without jeopardizing their government benefits?

Taxes and Fees.

With proper planning taxes and unnecessary fees can be minimized or completely eliminated.

Legacy.

With property planning, you can leave your affairs in order, avoid family conflicts and chaos, and leave a legacy of being a good steward.

Contact us:

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Estate Planning For Our Times

Name: _____ Spouse (Partner): _____

Address:_____ City:_____ State: _____Zip:_____

Cell Phone:_____ Spouse (Partner) Cell:_____

Email Address:_____ Spouse (Partner) Email Address::_____

Citizenship:_____ State of Residence:_____ Citizenship:_____ State of Residence:_____

Marital Status: ☐Married ☐Divorced ☐Widowed ☐Single		Age Group: ☐18-30 ☐31-45 ☐46-65 ☐65+
Minor Children: ☐Yes ☐No	Special Needs Dependent: ☐Yes ☐No	Other Dependents (Aging Parents): ☐Yes ☐No

My Current Estate Planning Status

☐No Estate Plan	☐ Have a Will	☐ Have a Living Trust	☐ Other:_____

Has Anything Changed Since You Planned?

☐Marriage/Remarriage	☐ Divorce	☐ Received an Inheritance	☐Increase in Assets
☐Residence	☐New Dependents	☐ Executor/Guardian	☐ Intentions/Goals

Who would handle your affairs? Do you have a Durable Power of Attorney? With a Durable Power of Attorney, you can designate the person(s) that you would want to manage your financial and personal affairs in the event you are not able. We recommend you always name three people, in order of preference. If the first person cannot assume the role, then the next person would step in.

Name:	Address	Telephone	Relation
1.			
2.			
3.			
4.			

Comments: _____

_____

_____

_____

Signature _____ Date _____

PERMISSION TO CONTACT: I authorize Menendez Law Firm to contact me by phone, email, or mail.
I understand I can withdraw permission at any time, and that the law firm will not sell or share my contact information with anyone.

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