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## Estate Planning and Probate

The Law Office of Kathy Brissette-Minus, LLC, offers estate planning options customized for your particular needs. Schedule a conference today if you think you need a “simple will”, if you know you have a complex estate, or even if you do not know where to begin your planning.

Our office also assists you in estate administration in the event of the death of your loved one. Contact us for a full description of services provided, which includes areas of practice beyond estate planning and probate.



*Your family is counting on you.*



*Proverbs 13:22*

*A good man leaveth an inheritance for his children's children: and the wealth of the sinner is laid up for the just.*

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### LAW OFFICE OF KATHY BRISSETTE-MINUS, LLC

*Planning for your today and your tomorrow™*

## Estate Planning 101



**Tel: 301-883-8710**

# Estate Planning 101

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*You can direct the course of acquired riches and wealth.*

Most of us have conventionally believed that estate planning is for people like Bill Gates and Oprah Winfrey. Estate planning happens for all of us, if we own or have in interest in personal or real property at the time of our death.

Estate planning is a process used to direct and protect your assets for your use during your lifetime and for your future generations. Estate planners are attorneys who consider your assets, liabilities, income and expenses, along with tax implications, and who then fashion an overall plan to protect your wealth in the manner you desire.

Did you know that your state or jurisdiction has a plan for you if you fail to plan yourself? Do you know what it is?

## YOUR ESTATE PLAN

Four of the most basic tools available in your estate planning arsenal are a will, a revocable trust (you probably have heard this referred to as a “living trust”), a health advance directive, and a



*Estate planning is well within your grasp.*

power of attorney. A will sets forth your plan for distributing your assets upon your death. It also nominates a personal representative who will be responsible for carrying out your wishes. If you own real property or other assets, you should have a will.

A revocable trust enables you to avoid the probate process and probate costs. A living trust is created during your lifetime. The trust holds property for your benefit and provides directions to your trustee upon your death. I often recommend this tool for my clients.

A health advance directive appoints someone to make medical decisions for you if you are incapacitated and cannot make them yourself. The “living will” component includes “do not resuscitate” language if that is your desire.

A power of attorney appoints someone to make personal business decisions in the event your incapacity. It allows your attorney-in-fact to complete tasks such as paying your bills and filing your income tax returns as necessary.

## THREE SIMPLE STEPS

Please take these three simple steps after you read this brochure :

### 1. Set a goal

Understand what you want to accomplish with your estate plan. Perhaps it is to minimize tax consequences, to provide for your children upon death, or to give to your favorite charity.

### 2. Take inventory

Within the next thirty days, make a list of your assets, liabilities, income and expenses. If that seems too difficult, make a list of what you own.

### 3. Meet with an estate planner

Estate planning is generally accomplished through meetings with your attorney, financial planner, and your accountant. If you don't have one of these professionals on your team, it's okay. Meet with your attorney who will help you focus your thoughts to accomplish your estate planning goals.

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