

Junnier Law & Research P.A.

A man with dark hair, wearing a light-colored suit jacket over a white shirt, is sitting at a dark desk. He is smiling and looking towards the camera. His hands are clasped in front of him. On the desk, there is a laptop, a white mug with coffee, and a telephone. In the background, there is a framed picture on the wall and a dark cabinet.

**Florida &
International
Wills, Trusts
& Estates**

**Prospective
Client Guide**

We think you're going to live forever.

But just in case. . .

Make an Estate Plan

Junnier Law & Research P.A.
www.JunnierLaw.com

Estate Planning Services

Junnier Law & Research P.A. offers both estate planning and documentary services.

Our Trust-based Estate Planning Services

begin with a general discussion of your assets and the life circumstances of yourself and your loved ones. We will then ask you to complete a series of detailed questionnaires which will allow us to customize an estate plan specific to your needs. Please note that completion of these forms will take a significant amount of your time. We will then schedule two planning meetings. The first will present an asset, lifestyle, and family protection plan should you become incompetent. This will include instructions about when and how your loved ones will need to let you go. The second is an estate design plan meeting to discuss asset protection and distribution after your death. This plan will account for minimizing taxation, but more importantly, will protect loved ones with creditor, addiction, developmental, or other special needs. We can even create contingencies so your animal family members will always be fed and have a home. We will also discuss what you want to happen with your remains.

This is our goal: To give you the comfort and confidence that when it's time to leave, those you love will be bereaved, but protected.

For those with more modest needs, we also offer standalone documentary services, such as the creation of detailed and customized wills, trusts, durable power of attorney, HIPPA waivers, healthcare surrogates, and so called "living wills." You can expect the aggregate length of these documents to be equivalent to a short novel.

If you would like information about our signature international estate planning services, please contact us for further information at Info@JunnierLaw.com, as foreign asset and beneficiary issues can become extremely complex.

Our Wills

Complete Wills

A "Complete Will" appoints a personal representative and directs that personal representative to immediately distribute all estate assets to your beneficiaries upon the end of a public probate process.

Smart Wills

A "Smart Will" appoints a personal representative and creates a testamentary trust which directs how, when, and under what circumstances the personal representative (now called a trustee) is to distribute all estate assets, either all at once or over time, upon the end of a public probate process. Conditions on distributions can protect assets from creditors and can ensure beneficiaries do not lose needed government benefits. They can also direct distribution only once life benchmarks are met, such as age, educational or occupational accomplishments, or marriage. They can even be used to protect the welfare of your pets and suggest guardianship for your minor children.

Pour-Over Wills

All trusts require a pour-over will. A pour-over will transfers all estate assets that are not already in your trust, into your trust, upon the end of a public probate process. However, we strive to ensure that all of your assets are either in your trust, or immediately transferred upon death through joint accounts, naming the trust as the beneficiary to insurance policies or IRAs, and other legal constructs.

Please note that all wills are subject to a public probate process and offer no protection should you become incapacitated.



Our Trusts

Complete Trusts

A “Complete Trust” is a revocable living trust that appoints you as the trustee and beneficiary of that trust. You transfer your property from yourself to the trust. Should you become incompetent, the trust appoints a successor trustee to manage your assets for your benefit, or should you choose, also your family’s benefit. When you die, it becomes an irrevocable trust which appoints your successor trustee and directs that trustee to immediately distribute all trust assets to your beneficiaries. There is no public probate process and therefore the delay before distribution is shortened.

Smart Trusts

A “Smart Trust” is a revocable living trust that appoints you as the trustee and beneficiary of that trust. You transfer your property from yourself to the trust. Should you become incompetent, the trust appoints a successor trustee to manage your assets for your benefit, or should you choose, also your family’s or a charity’s benefit. When you die, it becomes an irrevocable trust which appoints your successor trustee and directs how, when, and under what circumstances that trustee is to distribute trust assets to your beneficiaries. There is no public probate process and therefore the delay before distribution is shortened. Conditions on distributions can protect assets from creditors and can ensure beneficiaries do not lose needed government benefits. They can also direct distribution only once life benchmarks are met, such as age, educational or occupational accomplishments, or marriage. They can even be used to protect the welfare of your pets and suggest guardianship for your minor children.

Laws and Strategies Change so Should your Wills & Trusts

Presenting the

Wills & Trusts

EVOLVE

Junnier Law & Research P.A.
www.JunnierEstateLaw.com

Wills & Trusts Evolve

Laws and your personal circumstances change, and so should your will and trusts. This signature option allows you to make small changes to your wills and trusts for free and allows for three complete overhauls that become necessary with certain major life events. These life events may include marriage, divorce, procreation, starting a business, or retiring to another country.

Foreign Wills & Trusts

A “Foreign Will or Trust” is a will or trust that involves foreign assets.



Who will feed Fido?

A Free Pet Trust is included in every Junnier Law & Research P.A. Estate Plan.

**Call Today
(850) 201-7141**

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