

# Women Financial Power

## ESTATE PLANNING

prepared and presented by Women  
Financial Power





# MAXIMIZE LEGACY, MINIMIZE TAXES

We advise clients to think about legacy plans and ways to leave a sizable estate to the people who matter to them in a tax-effective manner. A financial legacy plan is put in place to leave to the people you love.

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# WHAT IS ESTATE PLANNING?

Estate planning means planning only for the distribution of property at your death.

In fact, the goal of estate planning should be to help you increase your estate during your years of accumulation, preserve your financial stability throughout your years of retirement, and arrange for the most effective transfer of property upon your passing.





## **DEVELOP, PROTECT, AND MAXIMIZE**

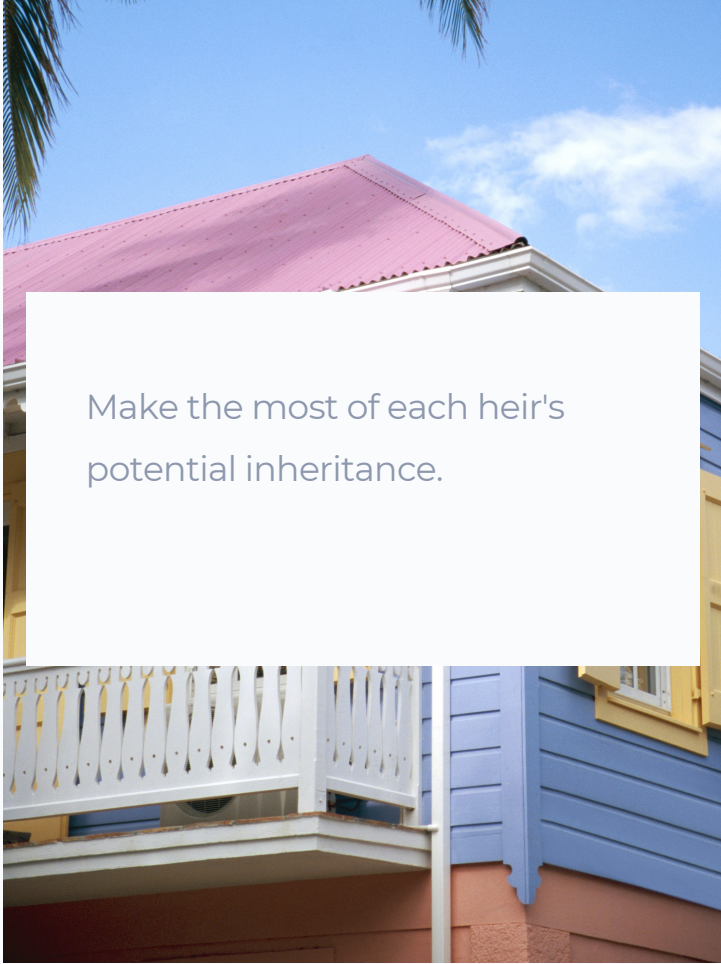
These objectives can typically be achieved with careful planning, which also saves money and helps to prevent the dispute and delays that are part of the estate distribution process.



balance your desires for specific bequests with the desire to maintain equitable distribution.



protect the business and its assets from liquidation, enabling it to pass on to the next generation intact.



Make the most of each heir's potential inheritance.

It is important to remember that estate planning is a complicated subject. Any preparation should be done with the help of estate planning or tax experts, and it should not be done until a detailed study of your financial and personal circumstances has been conducted, taking into account all of your possibilities.



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