

Estate Planning Pyramid

Esperti Peterson Institute, Inc.

Estate Planning is extremely important for life and death. It enables individuals to help control their assets, maintain their lifestyle, plan for incapacity, provide for loved ones, and avoid probate, court costs and attorney fees.

The following pyramid illustrates the building blocks of the estate planning process, including providing for you and your spouse, providing for your immediate/extended family, maintaining property, preserving and expanding wealth, saving taxes and minimizing planning costs. The main focus of the pyramid is on your family's goals, desires and overall mission.



"I want to control my property while I am alive and well, care for myself and my loved ones if I become disabled, and be able to give what I have to whom I want, the way I want, and when I want, and if I can, I want to save every last tax dollar, attorney fee and court cost possible."

Source: Esperti and Peterson, "Generations," Esperti Peterson Institute, Inc., 1999, at 4.

Don't put off until tomorrow what should be done today. Contact your Financial Advisor today to discuss the potential benefits of estate planning for you and your family.

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