

The crucial role of **WILLS & TRUSTS**

SECURING YOUR LEGACY: UNDERSTAND IT'S VITAL IMPORTANCE

Life is unpredictable, but your legacy doesn't have to be. A will and trust are not just legal documents—they're instruments of security and assurance for you and your loved ones. Without them, the fate of your assets, the care of your dependents, and the execution of your wishes fall into uncertain hands. Take control of your future today by understanding why wills and trusts are indispensable tools for ensuring your legacy endures as you intend it to. Maintain control over your assets & allocate resources according to your values, priorities, and the needs of your beneficiaries.

TIPS TO REMEMBER



Estate planning is a complex legal process. Ensures your documents accurately reflect your wishes and comply with legal requirements.



Life changes, so should your estate plan. Regularly review and update your will and trust to reflect these changes to align with your wishes and objectives.



Be comprehensive and precise in detailing your wishes, including who inherits what, how assets are to be managed / distributed, & any specific instructions or conditions you impose.

Did you know? Without a will, state laws dictate how your assets are distributed. AKA intestacy, may not align with your wishes and can lead to lengthy legal battles among family members. Protect your legacy proactively. *Ask us what other financial strategies you can benefit from.*



ASSET PROTECTION & PROBATE AVOIDANCE

A trust serves as a powerful tool for shielding your assets from probate, the court-supervised process of distributing assets. By bypassing probate, trusts offer greater privacy, reduce administrative costs, and expedite the transfer of assets to beneficiaries.



INCAPACITY & DECISION- MAKING AUTHORITY

Through powers of attorney and healthcare directives established within a trust or will, you can designate individuals to manage your affairs and make important decisions if you become incapacitated. Bypass the need for court-appointed guardianship, providing peace of mind for you and your loved ones.



CONTROL & FLEXIBILITY IN DISTRIBUTION

With a will or trust, you maintain control over the distribution of your assets, enabling you to allocate resources according to your values, priorities, and the needs of your beneficiaries. Whether you wish to provide for loved ones, support charitable causes, or implement asset protection strategies, a will and trust offer the flexibility to customize your estate plan to suit your objectives.



CONTACT US



www.legacywealth.finance



contact@legacywealth.finance

