

THE SAUER LAW FIRM LLC

ESTATE PLANNING: THE BIG PICTURE

What do I need to know about Estate Planning?

It's about more than just your _____.

Irrevocable Trusts generally allow you to protect assets for _____ by giving up _____ interests in those assets _____.

vs

Revocable Trusts can:

- Make transitions easier

- Allow for ongoing (but flexible) control

- Provide beneficiaries with:

 - Asset protection benefits after your death

 - Tax efficiency after their own deaths

NJ Inheritance taxes range from ____% - ____%

Consider doing charitable giving through your ____ - ____ retirement accounts

Next Steps:

- Think about your goals / the legacy you want to leave behind

- Meet with an estate planning attorney

- Communicate with family members and agents about your wishes

- Bring asset ownership and beneficiary designations into alignment with your plan

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