

# THE SAUER LAW FIRM LLC

WILLS, TRUSTS & ESTATES SINCE 2020

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 legacy

- Meet with an estate planning attorney

- Align your holdings

- Communicate with family members and agents about your wishes

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