

ESTATE PLANNING

Estate planning is the way to control the distribution of your estate. Since you own the property in your estate, it is your right to say what happens to it. Estate planning includes working with an attorney to draft documents that specifically state how you wish to distribute your wealth. Other important issues include, but are not limited to, a healthcare directive in the event you become terminally ill. Most importantly, if nothing else, estate planning is making sure your loved ones are taken care of according to your wishes.

HOW CAN KABAREC FINANCIAL ADVISORS HELP YOU?

Kabarec Financial Advisors will review your current estate plan to determine if it meets your current objectives. The process includes an assessment of all your legal documents, current asset ownership (titling), and beneficiary designations and we will make recommendations for changes that have occurred in your life. We will work with your attorney or refer one to you in order to have your legal documents drafted properly. Our intention is to ensure that your estate plan accomplishes your goals and objectives in the most tax efficient manner possible. If applicable, other wealth distribution strategies and charitable gifting options will be discussed.

Common estate planning documents Kabarec Financial Advisors recommends include:

- Living Trusts
- Pour over Wills
- Durable Power of Attorney for Property
- Durable Power of Attorney for Health Care
- Life Insurance Trusts
- Charitable Trusts
- Generation Skipping Trusts



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