Estate Decision Making Process

Life Overview

Wisdom, like an inheritance, is a good thing and benefits those who see the sun.

Wisdom is a shelter as money is a shelter, but the advantage of knowledge is this: Wisdom preserves those who have it.

- Ecclesiastes 7:11-12

01 How much to heirs; how much to charity?

02 Do I give equally to each heir?

03 When & how do I give?

- Current Giving
- Deferred Giving

04 In what form should I leave my assets?

05 What estate techniques should I use?

06 When should we have a Family Conference?

This estate planning exercise can help you manage the *coping gap between your heirs' expectations and reality.*

