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1 an estate plan tells your heirs and the courts how to divide up your assets but it also helps protect your loved ones from unnecessary hassle and expense as well as potentially months estate planning is putting your affairs in order so that your loved ones are taken care of if you die or are incapacitated a will is an essential piece of the plan whether you re an estate planning novice or pro fidelity has tips and tools to help you get where you want to be learn more about estate planning here estate planning is the process of deciding which people or organizations receive your possessions once you ve passed on it s also how you leave instructions for managing your care and assets what you need to know in your estate planning even if you do not have significant assets here are six key ideas for a successful asset transfer 12 simple steps to an estate plan take care of your family by making a will power of attorney living will funeral arrangements and more moving to a new state take a look at your estate plan if you move should you throw out your estate planning documents putting strings on what you leave your children your estate plan is much more likely to be successful when you recognize and avoid the most common mistakes and take some key actions that often are overlooked to be successful your estate plan should be customized be flexible provide long term asset protection for your heirs be entrusted to the right person or entity 1 customized for your family the more complex your estate the more desirable it is to have an estate plan that is customized to your particular goals and desires estate planning is the process of organizing

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your affairs before your death this includes making decisions about who will receive your property and how debts and expenses will be paid here are five estate planning tips that can help you ensure that your plan achieves your goals create a formalized estate plan the first step to successful estate planning is simply getting started having an estate plan in place is crucial to ensuring your vision is carried out as you d like one of the most significant advantages of estate planning is the potential to reduce or eliminate estate taxes strategic planning including the use of trusts and other financial instruments can help preserve more of your wealth for your beneficiaries it s a process best pursued in collaboration with your family ensuring a strong foundation that supports the needs and aspirations of all generations involved here are five steps to help you four tips for successful estate planning aflac mon jun 17 2024 9 00 am 5 min read link copied 0 new york ny accesswire june 17 2024 estate planning is a crucial piece of financial four tips for successful estate planning provided by accesswire jun 17 2024 4 00pm new york ny accesswire june 17 2024 estate planning is a crucial piece of financial management it

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