



# UNITED ESTATE PLANNING, INC.

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## Advantages of a Living Trust?

- ❖ Avoids all probate and related costs, both financial and emotional.
- ❖ Reduces or eliminate estate taxes.
- ❖ Allows quick distribution of assets to beneficiaries.
- ❖ Preserve asset management.
- ❖ Very hard to contest.
- ❖ Let's you keep control, even at disability, as well as after you death.
- ❖ Prevents a conservatorship or guardianship at disability or incompetency.
- ❖ Minimize emotional stress on your family
- ❖ Prevents unintentional disinheritance.
- ❖ Avoids problems at joint ownership.
- ❖ Inexpensive, easy to set up and maintain.
- ❖ Completely flexible-can be changed or revoked any time.
- ❖ Can protect dependants with special needs.
- ❖ Protects minor children from court imposed guardianship.
- ❖ Makes an effective pre-nuptial agreement.

## Your Revocable Living Trust will include the following and much more:

- ❖ Living Trust w/ a copy kept on file
- ❖ Certified Summary of Trust
- ❖ Medicaid Provision Clause
- ❖ Last Will and Testament (Pour Over Will)
- ❖ Real Estate Property Transfer(s)
- ❖ Durable Power of Attorney – General
- ❖ Durable Power of Attorney – Healthcare
- ❖ Trustee Instructions
- ❖ Glossary of Terms
- ❖ Burial Instructions
- ❖ Funeral Check List
- ❖ Estate Inventory (ie: Schedule A)
- ❖ Guardianship Clause (if applicable)