

## Common Estate Planning Considerations: Creating a Lasting Legacy



### Featured speaker

**Melissa Shaw**

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**The new year is a great opportunity to lay the foundation for your future financial well-being.**

**March 27, 2024**  
Noon to 1 p.m. (PT)

**REGISTER NOW**

In life, nothing is certain, but you can help improve your overall financial well-being by creating an estate plan. In this seminar, we will help you think through important lifetime planning issues and state planning techniques, including:

- Preparing for health and financial decisions to be made if you are not in a position to make them yourself
- Determine whether lifetime gifts to your loved ones or charity should play a role in your planning
- Knowing what questions to ask your attorney to execute an effective estate plan
- Familiarize yourself with the basic planning documents to implement as part of your estate plan
- Understanding the importance of asset ownership and beneficiary designations
- Evaluating the potential for estate taxes.



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