

2024 - Mallory Connections Estate Planning, Call #01

**STARTING
SOON**

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AGENDA

- INTRODUCTIONS 6:00 PM**
- PURPOSE OF THIS CONTENT**
- PRESENTATION (PART ONE)**
- DISCUSSION (ONGOING).....**
- WRAP-UP ~ 6:30 PM**

Introduction to Estate Planning

- ❖ **ESTATE PLANNING ENSURES YOUR WISHES ARE FOLLOWED AFTER DEATH OR INCAPACITATION.**
- ❖ **HELPS MANAGE AND DISTRIBUTE ASSETS SMOOTHLY.**
- ❖ **REDUCES FAMILY STRESS AND POTENTIAL LEGAL CHALLENGES.**

Why Estate Planning Matters

- ❖ **CAN AVOID PROBATE COURT, WHICH CAN BE TIME-CONSUMING AND COSTLY.**
- ❖ **PROTECTS LOVED ONES BY ENSURING ASSETS GO TO INTENDED BENEFICIARIES.**
- ❖ **REDUCES ESTATE TAXES AND LEGAL FEES.**

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Wills ...

The Foundation of an Estate Plan

- ❖ **A LEGAL DOCUMENT SPECIFYING WHO INHERITS ASSETS.**
- ❖ **IDENTIFIES GUARDIANS FOR MINOR CHILDREN, IF ANY.**
- ❖ ****MUST GO THROUGH PROBATE, BUT IT SIMPLIFIES ASSET DISTRIBUTION.**

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While there may be some questions, we want you to know we are not legal or financial professionals; therefore, our answers will be very limited.

**High-level information was shared.
We encourage you to think about the content of this presentation and your next steps for estate planning.**

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If there is interest, we can have a follow up call with more in-depth discussion leading to a legal and financial professional to share more details.