



Probate. Wills. Trusts. Planning.

PLANNING MATTERS

Quarterly Digest for Professional Advisors | November 2016

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6-Step Estate Planning Checklist for 2017



Clients often tell us that creating "to do" lists each morning keeps them productive and engaged.

And when it comes to retirement and estate planning, clients admit they welcome an occasional nudge from professional advisors regarding important action items they may have forgotten. As we look ahead to 2017, the month of November is the perfect time to "dot the i's and cross the t's."

We've compiled this six-step estate planning checklist to help professional advisors

facilitate their Q4 planning meetings with clients. [Read more.](#)

Greed or Passive Opportunism? Financial Exploitation of the Elderly on the Rise

It's hard to imagine anything more heartbreaking than litigating a probate case involving the apparent financial exploitation of an elderly citizen with dementia.

But the sad reality is that financial exploitation of the elderly is on the rise. Perpetrators range from caregivers, homeowner scams and handymen, to family members and “institutional perpetrators” such as professional trustees and non-profits.



As the Holiday Season approaches, our seniors become even more vulnerable. Learn how to spot the signs of “passive-aggressive opportunistic tactics” by perpetrators that range from handymen to churchmen. [Read more.](#)

Trump vs. Clinton Tax Policies



Tonight, we should know who will be our next president. While Congress passes tax legislation, the president shapes policy. What are Donald Trump's plans for the estate tax, versus Hillary Clinton's position? How do their plans differ compared to the current rules?

[Read](#) Merrell Bailey's article, "**The Federal Estate Tax, the Capital Gains Income Tax, and the Presidential Candidates.**"

Nationwide Survey: Most Americans Are Confused About Estate Planning

According to a recent survey of 2,036 adults conducted by WealthCounsel, many Americans do not engage in estate planning -- primarily because they don't understand what the term "estate planning" means.

Results from the survey indicate that most believe estate planning is for the ultra-wealthy. Therefore, they believe most Americans do not need to do it.



Below is a brief sampling of the survey's findings:

- 74% believe estate planning is a confusing topic
- 50% think that wills protect them from probate court
- 49% stated their assets aren't worth enough for them to have an estate plan

It's unfortunate that millions of Americans are misinformed or uninformed. At **Your Caring Law Firm**, we emphasize the importance of financial literacy (financial capability) for individuals of all ages. That's why we devote a substantial amount of our resources and time to the following:

- Conduct free [workshops in our office](#) on a wide range of life planning topics.
- Post info on the [Estate Planning e-Learning Center](#) on our website.
- Publish [newsletters](#) for consumers and professional advisors.
- Teach [courses or workshops](#) throughout the community.

Our goal is to penetrate the knowledge gap and to prevent consumers from getting "hung up" on confusing terms and definitions.

We encourage clients to educate themselves using library, online, and in-person resources to boost their understanding of financial matters. [EstatePlanning.com](#) is an excellent resource for consumers, and a terrific place to start.

Cookies & Counsel™

Mark your calendar for our upcoming events. [Learn more.](#)



PROFESSIONAL SERIES (Peer-to-peer networking and learning!)

Nov. 17, 2016 (10:30-11:30 a.m.) Merrell Bailey presenting. [Register here.](#)
Congress Confiscated the Cranberry Sauce: Valuation Discounts Going Away

The IRS quietly -- and quickly! -- is changing transfer tax laws regarding partnerships, LLCs, and family businesses. What techniques still will work?

Nov. 22, 2016 (1:30-2:30 p.m.) Hallie Zobel presenting. [Register here.](#)

Newbies are at Thanksgiving Dinner: Planning for Fluctuating Family

Your family photo has added two babies, dropped a son-in-law, and gained a step-son. How do you incorporate only the people you want in your estate

plan?

FAMILY SERIES (Bring your clients!)

Nov. 10, 2016 (11:00 a.m. -12:00 p.m.) Hallie Zobel presenting. [Register here.](#)

Nov. 30, 2016 (3:00-4:00 p.m.) Hallie Zobel presenting. [Register here.](#)

Dad is Home Alone for the Holidays: Check on Dad if You Can't Be There

Dad didn't send annual corny holiday cards? Sent his 36 year old grandson jammies with feet? Discuss warning signs that Dad isn't doing so hot.

Community Involvement

Your Caring Law Firm is a proud sponsor of the **Maitland Middle School Orchestra Program**. Mrs. Lisa Hopko has really built up the school's orchestra program over the last 14 years and we'd like to congratulate her. She is simply amazing!



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