

IS YOUR ESTATE PLAN UP-TO-DATE?

When was the last time you reviewed your trust and estate documents? If it has been more than a few years, now would be a good time. A regular assessment provides you the opportunity to react to changes that have occurred either in the tax code or in your personal life. Perhaps your financial objectives have changed, or you need to make new choices with regards to your executor, trustee, or guardian. Maybe a major life event, like a birth, a change in marital status, or an inheritance, has taken place. All of these may have an effect on your estate planning status and a periodic review will give you confidence you are covered.

Our Estate Planning Checklist can help you prepare for meeting with your estate planning attorney. For your copy, please reach out to us anytime.

Should you consider a revocable living trust?

A revocable living trust benefits you during your lifetime and upon death acts like a will allowing you to specify who will receive your assets. While there are numerous advantages of a revocable trust, the primary one is that it ensures the continued management of your assets should you become physically or mentally unable to handle your own affairs. Such trusts also avoid the probate process and are designed to be highly flexible.

Are you managing your cyber assets?

You know that keeping your user names, passwords, and other online account information safe is critical. But what about ensuring they are accessible to your beneficiaries in case of your incapacity or passing? We are happy to talk to you about how to manage your cyber assets (e.g., bank accounts, investment accounts, email, and websites) for both safety and accessibility.

What's new at FFG?

Brian has received a big honor as one of only 11 advisors from across the country to be named to Vanguard's 11-member Registered Investment Advisor Client Council. In this role he will attend two council sessions a year at Vanguard's Pennsylvania headquarters to discuss product and service improvements and current industry trends.

Also, this month, Seth will attend the JP Morgan Wealth Symposium in NYC, and Brian will be at the Schwab Investment Outlook event in Boston.



Call Seth or Brian anytime if you would like to know more about these or other questions you have.

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Important Disclosure Information

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