
Top 5 New Year's Estate Planning Resolutions

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The start of a new year is a time for us to reflect on what we would like to accomplish in the coming year and resolve to implement changes in our lives necessary to accomplish those goals. If you are like many other Americans, in past years you have resolved to lose weight, exercise, or develop healthier habits. This year, consider setting some estate planning goals such as the five that follow.

1. Make or update your estate plan.
2. Plan for incapacity.
3. Plan for transfer taxes.
4. Gift strategically.
5. Coordinate your ownership of assets and beneficiary designations with your estate plan.

Depending on your motivation level, feel free to resolve to implement all of them, or start with just one or two.

Building an estate is a lifetime effort. With the new year, why not resolve to take the steps necessary to ensure that your lifetime of effort will have a meaningful impact for your heirs. The attorneys at Young Moore and Henderson, PA welcome the opportunity to help you accomplish your estate planning objectives and meet your New Year's resolutions. Please contact us if we can assist you.

About the Author

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Sue concentrates her practice in the areas of estate planning and administration and wealth transfer. She assists clients in the preparation, revision and updating of estate planning documents including wills, revocable living trusts, irrevocable life insurance trusts, powers of attorney (for both asset management and health care), and living wills. Sue also advises individuals on planning for and minimizing estate taxes, and counsels clients on the development of gifting strategies, including annual exclusion gifting and charitable gift planning. Sue also counsels clients on asset protection issues.

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