

# *Fed Advantage*

## **Estate Conservation**

### **Introduction**

- Workshop Objectives
- Our Commitment
- About Your Workbook

### **Estate Conservation Fundamentals**

- 4 Principles of Estate Conservation
- Benefits of Estate Conservation
- Estate Documents

### **Estate Conservation Challenges**

- Finding a Qualified Attorney
- Probate
- Estate Taxes
- Annual and Lifetime Gift Tax
- Unlimited Marital Deduction Exclusion
- Potential Need for Long Term Care

### **Basic Distribution Techniques**

- Intestacy
- A Will
- Choosing an Executor
- Penalties and Surrender Charges
- Jointly Held Property
- Contracts

### **Trust Strategies**

- What Is A Trust?
- Testamentary Trust
- Living Trust
- Revocable vs Irrevocable Living Trusts
- Special Needs and Incentive Trusts
- Why Consider a Bypass Trust?
- Irrevocable Life Insurance Trusts
- Last Survivor Life Insurance Policy
- Charitable Trusts
- Charitable Remainder Trusts
- Charitable Lead Trusts
- Wealth Replacement Trusts
- Which Charitable Trust Might Be Appropriate for You
- Estate Plans Should Be Reviewed Periodically

### **Figuring Out Your Net Cash Flow**

### **Figuring Out Your Net Worth**

