

## What Interests You to Learn More About??

*Indicate any seminar or workshop topics you would like for future Briefings and send this form to us by mail or email.*

### **Planning:**

- How To Talk To Loved Ones (who don't want to talk to you, but should) About Their Estate Plan
- Settling The Estate ("Listen Buddy, we can do this the easy way or the hard way. Which one do you want?")
- Jewelry Or Other Hard To Value Assets Appraisals
- Disposing Of A Lifetime Of "Treasures." Ever cleaned out a house lived-in for 40 or 50 years?
- Vacation Home And Heirloom Property Planning. How to keep it in the family with harmony.

### **Saving Taxes / Philanthropy:**

- How To Give Money To Charity Instead Of The Government In Estate Taxes
- Accomplishing Modest Philanthropy – Make a Little Mark on Society and a Big Mark on your Family
- Accomplishing Major Philanthropy – Make A Big Mark. Period.

### **Financial:**

- How and When To Choose A Financial Advisor and The Role Of The Family Financial Assistant
- Retirement Plan Trusts
- How Best To Make Gifts and Loans To Family
- Business Succession Planning
- Professional Practice Succession Planning

### **Protection:**

- Personal Document And Data Storage
- Asset Protection Basics
- Asset Protection For Doctors And Other Professionals
- Special Needs Trusts for Loved Ones with Unique Needs
- How To Have The Advantage Of Inheriting In A Trust When Your Parents Didn't Leave You One

### **Essentials:**

- Living With Your Inheritance Trust
- Living With Your Irrevocable Trust
- Living with Your Revocable Trust
- We All Say It's Ok To "Pull The Plug," but What Do We Really Mean, and When Is It Time?
- What Does It Mean To Be A Trustee and When Is A Professional Trustee A Good Idea?