

INTRODUCTION

Estate planning is a method of preparing and managing an individual's property and assets, known as their "estate," at their death. An individual's estate may include real property, automobiles, stocks and investments, art collections, life insurance policies, pensions, retirement accounts. An estate may also include debt.

Estate planning can help preserve family wealth, provide for a surviving spouse and children, fund a child's education, or make gifts to charities. It can also reduce or eliminate estate taxes, as well as many of the delays and expenses of probate. In addition, strategies can be implemented to limit taxes on charitable donations and other gifts. Other reasons for estate planning include:

- To provide for the transfer of your business at your retirement, disability, incapacity, or death.
- To provide for family members with special needs without disqualifying them from government benefits.
- To provide for family members who are irresponsible with money or who may need protection from creditors.

SERVICE OVERVIEW

The thought of planning for the end of life may seem intimidating at first, but legacy planning can help cultivate peace of mind for you and your heirs. Having an organized, carefully thought-out plan for the administration and the distribution of your estate is an important first step to taking care of your loved ones later in life.

Unlike traditional law firms that charge by the hour and approach estate planning as a one-time transaction, we provide custom, flat-fee estate plans that are carefully designed to ensure that your estate is administered, that your final wishes are met, and that your loved ones are looked after.



REPRESENTATIVE SERVICES

- Comprehensive Estate Plans
- Revocable Living Trusts
- Powers of Attorney
- Advance Health Care Directives
- Last Wills and Testaments
- Special Needs Trusts
- Irrevocable Special-Use Trusts
- Child Guardianship Planning
- Asset Protection Entities
- Non-Citizen Estate Planning

We are honored to be your trusted legal advisor and can help plan for additional support for yourself and your family in the case of incapacity or disability. We also work to protecting your assets and beneficiary's inheritance from creditors, lawsuits, spouses, and estate taxes.

CONNECT

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