WAYS TO AVOID PROBATE





CREATING A

Allows your assets to be managed by a trustee during your life, and then to be distributed directly to the beneficiaries upon your passing





NAMING BENEFICIARIES ON YOUR FINANCIAL ACCOUNTS

Allows the balance of the accounts to be distributed directly to the named beneficiaries, avoiding probate





JOINT OWNERSHIP OF PROPERTY

Holding property jointly allows the property to automatically pass to the joint owner





GIVING GIFTS

Any assets that are no longer in your possession do not require probate

Avoiding Guide Probate

WJ Hussar

Avoiding Guide Probate:

The Complete Guide to Organizing Your Records for Estate Planning John N. Peragine, Jr., 2009 Planning your estate is a long complicated process that requires much time and effort The process of organizing your records for estate planning is equally time consuming and complex Hiring an attorney to assist you may cost more than you are willing to spend With the help of The Complete Guide to Organizing Your Records for Estate Planning you can not only take charge of your estate planning documentation but also save time money and effort In this new book you will learn how to find an organizational system that works for you where to look for records what to record who to tell where to keep records and how often to update your records You will also find information on creating a will or a living will setting up a trust assigning power of attorney and filling out health care directives Additionally you will learn about the documents that should be included in your estate plan such as insurance policies Social Security cards birth certificates of minor children stock brokerage statements credit card numbers and statements certificates of deposit real estate deeds mortgage statements retirement account savings non retirement account savings and current bank statements The CD ROM is filled with sample documents and worksheets as well as a checklist of often overlooked information including any medications you take where you worked where your savings and checking accounts are located where your car title is located what your funeral plans or wishes are and who should receive what The Complete Guide to Organizing Your Records for Estate Planning will help you prepare your documents and record your final instructions and wishes By using the information provided in this book you will save money you might otherwise have spent on legal and accounting fees In addition you will save your family the frustration of searching for these documents if something should ever happen to you This book written in an easy to understand language will walk you through the process of organizing your records and make the process much easier for you and your family The companion CD ROM is included with the print version of this book however is not available for download with the electronic version It may be obtained separately by contacting Atlantic Publishing Group at sales atlantic pub com Atlantic Publishing is a small independent publishing company based in Ocala Florida Founded over twenty years ago in the company president e tm s garage Atlantic Publishing has grown to become a renowned resource for non fiction books Today over 450 titles are in print covering subjects such as small business healthy living management finance careers and real estate Atlantic Publishing prides itself on producing award winning high quality manuals that give readers up to date pertinent information real world examples and case studies with expert advice Every book has resources contact information and web sites of the products or companies discussed The Executor's Guide Mary Randolph, 2021-03-30 Millions of baby boomers are currently or will soon be serving as executors and this book shows exactly what to do to make the job manageable The Business Owner's Guide to Financial Freedom Mark J. Kohler, 2017-11-14 TAKE CONTROL OF YOUR FINANCIAL FUTURETailored for small business owners and entrepreneur like yourself who are looking for long term financial planning

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