
THE **INVESCO** Alternative

Dedicated to helping you ...
... Achieve Financial Independence

Number 151 Wealth Management - Estate Planning - IRA's April 6, 2010

Registered Investment Advisors - Certified Public Accountants - Real Estate Brokers
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Estate Planning

Do You Have An Exit Strategy?

When you die, do you want to be remembered for the financial chaos you left behind or would you like to have "things in order" for your relatives?

Do you have a "plan in place" of how you want your finances handled upon your demise or will you just hope for the best, opting for the government plan (meaning probate, high estate, capital gains, and income tax consequences)?

Are you up-to-date on gifting and estate tax exemption amounts? What happens to your IRA? Will the government take 60-90%? Could you use a Family Living Trust or Family Limited Partnerships or could a simple will suffice? Maybe you have a favorite charity or you want to make sure your chosen heirs (children or grandchildren?) inherit your assets tax-free. How should you inform your heirs of your intentions?

If you would like to discuss these topics as well as where to keep written instructions so that upon your death or incompetence there won't be any unnecessary disruptions to your relatives' lifestyle, then call us about our upcoming April 29th dinner / discussion.

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