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WHERE GOALS ARE BORNE TO SUCCEED

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Estate Planning Made Simple

What Every Family Should Know Before Probate Makes the
Decisions for You



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Why Families Are Paying Attention to This Now

Every year, thousands of families discover — usually at the worst possible moment — that having a will was not enough.

A death in the family triggers a legal process called probate, and for many households it brings delays, unexpected costs, and decisions that are suddenly out of their hands.

The truth is, most people don't find out how probate actually works until they're already living through it. By then, the options are far more limited, and far more expensive, than they would have been with a little advance planning.

This guide won't turn you into an estate planning expert in five minutes — no short document could. But it will help you understand what's really at stake, which questions matter most, and why so many families are choosing to sit down (virtually, from home) and get real answers before they need them.



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3 Myths That Cost You Thousands

MYTH #1: "I already have a will, so my family is protected."

A will is a good start — but on its own, it typically does not avoid probate. Depending on your situation, that can mean months of court involvement before your family sees a dime.

MYTH #2: "Trusts are only for wealthy families."

This is one of the most common misconceptions we hear — and one of the most costly. The families who benefit most from planning ahead aren't always who you'd expect.

MYTH #3: "I can figure this out later. There's no rush."

Estate planning only works if it's in place before it's needed. Life doesn't wait for a convenient time, and neither does probate court.

We unpack each of these in detail — including what actually happens instead — during the workshop



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What Is a Revocable Living Trust? (The Short Version)

In plain terms, a revocable living trust is a legal arrangement that can allow your assets to pass to your loved ones without going through the probate court process — while you remain in full control during your lifetime. That's the simple explanation.

The real value is in the details:

- How a trust is structured, what it can (and can't) protect.
- How it interacts with your home, accounts, and beneficiaries.
- How it's different from a will in practice — not just on paper.

Those details are exactly what tend to trip families up when they try to piece things together on their own, and exactly what we walk through step by step in the live workshop.



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Questions Worth Asking Before It's Too Late

Take a moment and think honestly about each of these. If you're not confident in your answer, you're not alone — and you're exactly who this workshop was designed for.

- If something happened to me this year, would my family need court approval to access our accounts?
- Does my current plan (if I have one) actually avoid probate — or just delay the paperwork?
- Who is legally authorized to make decisions on my behalf if I can't?
- Have I reviewed my plan since a major life change — a move, a marriage, a new grandchild, a change in assets?
- Do I actually know the difference between a will and a trust — or just that I should probably have one of them?

These aren't trick questions. They're the exact starting point of our workshop discussion — and getting clear answers is often the single biggest relief families report afterward.



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Estate Planning Made Simple

A Free Virtual Workshop

WHEN: Last Saturday of Every Month

WHERE: Live & Virtual — Attend from Home

COST: Free

SEATS: Limited to Keep It Personal

In this workshop, you'll get the parts we couldn't fit in this guide:

- A clear, side-by-side comparison of wills vs. trusts for your specific situation
- The step-by-step process families use to actually avoid probate
- Common (and costly) mistakes to avoid when setting up a plan
- A live Q&A where you can ask about your own family's situation

Register for Our FREE Estate Planning Workshop



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