

STOP YOUR INHERITANCE FROM BEING STOLEN, WASTED OR LOST

When one has a will in place and dies, the will designates an executor to assemble, record and distribute assets as prescribed in the will. A Trust can have similar goals with a designated trustee/s to follow the Trust instructions. Without a will the assets/estate becomes a court procedure for settlement intestate. Many heirs receive little, much less or nothing after long court situations.

Often the designated will executor or trustee is a family member or friend of the deceased who is designated to complete instructions from the will or trust. For this writing we use 'executor' to describe the responsible designate/s.

Through incompetence, greed or unfortunate circumstance an executor can waste, lose, hide or claim assets intended for others. All assets/estates, especially in multiple states with multiple children or marriages, require a professionally legal estate document to assure proper heirs receive the intended asset. This can be challenging for many executors. To complicate all, **60%** of Americans **have no will** or Trust.

WHAT TO DO

Asset Owner of Real Estate and Valuables

1. Instruct an estate attorney to prepare final estate documents

If cost is of importance, we refer legal plans that very economically allow will and other estate documents completed by an attorney near you or have your current attorney to advise an estate attorney. Contact us for information.

2. If not updated in past two years, update your will & final documents
3. Contact Ken Wheeler for alternatives of LegacyPlan detail as:
 - Guarantee heirs receive as you direct and wish
 - Give partial assets to charity of choice
 - Tax deductions eliminating much tax for all parties
 - Guarantee income from all assets without management worry
 - Prevent heirs, family and loved ones from asset disputes
 - Eliminate Executor or Trustee responsibility or errors
 - Prevent heirs from squandering or wasting assets
 - Have a true Legacy for heirs to admire for future years

Heirs and Beneficiaries of Recently Deceased Asset Owner

1. Determine who is Executor or Trustee of Estate
2. Instruct your attorney to certify delivery of notice to executor for request of estate distribution progress monthly or quarterly report and adequate record of asset compilation, value and disposition timeline. This can be done with non-threatening language, but assures executor awareness of legal responsibilities, plus executor is aware one has legal support of an attorney that could prevent error.

If cost is of concern, we refer legal plans that are economical and/or refer to an estate attorney near you. Contact us for information.

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