

LAW OFFICE OF
JOHN T. ANDERSON
1741 EAST WARDLOW ROAD
LONG BEACH, CALIFORNIA 90807

JOHN T. ANDERSON*
LISA R. NORMAN
ERIN M. PROTZMANN

*Certified by the State Bar of California as a
Specialist in Estate Planning, Trust and Probate Law

TEL (562) 424-8619
FAX (562) 595-9662
John@trustlaw.ws
www.trustlaw.ws

WHY PLAN?

The question frequently comes up: WHY SHOULD I HAVE A WILL OR DO ESTATE PLANNING?

1. Appoint a family member or friend to make medical and life-support decisions for you if you become incapacitated
2. Appoint an agent to handle financial decisions
3. Designate a Conservator to handle your personal and financial decisions if you become incapacitated (or would you like a court to name someone you might not even want in your home to handle your money?)
4. Name a person to handle matters upon your death (an Executor in a Will or Trustee of a Trust)
5. Specify gifts to be made upon your death and the distribution of your estate
6. Name a Guardian of your choice to raise children under 18 years of age (Don't you want to pick who raises your kids?)
7. Provide for distribution to beneficiaries later than at 18 (after college graduation; at 25 or 30, or over several years)
8. Avoid or minimize Estate Taxes (or do you want to contribute to paying off the National Debt?)
9. Eliminate 1 to 1-1/2 years of court proceedings and thousands of dollars of fees
10. Avoid income taxes on appreciated assets (if your home or stocks have gone up in value - planning can provide for a tax-free sale by the survivor)
11. Plan for spouses and children from multiple marriages (a lack of planning could pit children from prior marriages against the present spouse)

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All of this and much more can be dealt with to increase security and thus relieve tensions over, What if?

Don't you want the confidence of knowing you have discussed these matters and planned with a professional? NOW you can take care of this planning through the auspices of the same law office that has professionally assisted you in the past. Call for an appointment: (562) 424-8619.

We Look Forward to Serving You!

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