

# Wills versus Trusts

|  | Estate Tax Planning | Income Tax Planning            | Names Someone to Handle Your Affairs When You Die | Names Who You Want to Receive Your Accounts and Property | Names Someone to Handle Your Affairs If You Are Unable | Asset Protection for Heirs / Beneficiaries | Avoids Probate | Avoids "Living Probate" | Private Process |
|--|---------------------|--------------------------------|---|--|--|--|----------------|-------------------------|-----------------|
| <b>Doing Nothing – No Will, No Trust</b> | x                   | x                              | Government Decides                                | Government Decides                                       | Government Decides                                     | x  | x              | x                       | x               |
| <b>Will</b>                              | ✓                   | Limited and often not included | ✓   | ✓  | x  | Possible, but often not included           | x              | x                       | x               |
| <b>Trust</b>                             | ✓                   | ✓                              | ✓   | ✓  | ✓  | ✓  | ✓              | ✓                       | ✓               |

What's right for you - doing nothing – a will – a trust?  
 The answer depends on your circumstances and we are here to help.



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Consult with a qualified professional before making any legal, tax, or investment decisions

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