5 Steps for Securing Your Family's Future

Estate planning in Texas isn't just for the rich; it's a crucial step for anyone who wants to ensure their loved ones are cared for and their wishes honored.

Families of all shapes and sizes can create wills, trusts, and all the estate planning elements that will keep them protected in the future. And if you hire me as your lawyer, I'll guide you through every step of the process to ensure that every family member and every asset is accounted for.

Here's a guide to navigating the process:

- ☐ **Assess Your Assets and Wishes:** Take stock of all your assets, including real estate, investments, retirement accounts, and personal belongings. Decide how you want these assets distributed after your death.
- ☐ **Select Beneficiaries and Executors:** Choose who will inherit your assets (beneficiaries) and who will be responsible for administering your estate (executor). Make sure to discuss your decisions with these individuals beforehand.
- ☐ **Consult with an Estate Planning Attorney:** Consider seeking guidance from an experienced legal professional who can help navigate the complexities of Texas law and ensure your plan aligns with your wishes.
- ☐ **Draft Your Documents:** Work with your attorney to determine which documents are necessary for your estate plan and work together drafting them. Some common documents include:
    - ☐ **A will** specifies how you want your assets distributed after your death. In Texas, a will must meet certain formal requirements to be valid.
    - ☐ **Trusts** can provide additional control over asset distribution, offer tax advantages, and facilitate the management of assets for beneficiaries.
    - ☐ Advance directives, such as a **living will** and a **healthcare proxy**, outline your wishes regarding medical treatment in the event you are unable to communicate them yourself.
    - ☐ Another alternative is to designate individuals to make financial and healthcare decisions on your behalf if you become incapacitated. A durable power of attorney for finances allows someone to manage your financial affairs, while a medical power of attorney grants someone the authority to make medical decisions for you.
- ☐ **Review and Update Regularly:** Life circumstances and laws change over time, so it's important to review your estate plan periodically and make updates as needed. Major life events such as marriage, divorce, births, deaths, or significant changes in financial status should prompt a review of your estate plan to ensure it remains relevant and effective.

Remember – estate planning isn't just about finances.

It's a compassionate act of directing where your belongings go and how you want your end-of-life experience handled. Without a plan, there may be lasting impacts on your loved ones.

My goal is to make my clients feel comfortable in their decisions and reassured that they have a plan in place for their families.

Schedule a free consultation today so that we can go through your options together to create a plan that works best for you and your family.

-Jack Robinson

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