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Estate Planning

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CAN I AVOID PROBATE?

- 1- What is probate: authentication of a person's Will
- 2- Probate in Bergen County NJ is "simple" one-page probate petition (form), \$100-\$200 DIY, one month
- 3- Direct beneficiaries on all financial accounts – brokerage (optional), bank (optional), IRA (required), life insurance (required) – "TOD" "POD" "ITF"
- 4- Revocable Living Trust (fund if 75+) put all assets in it (cannot fund with IRA's)
- 5- Joint title (H/W on house deed, brokerage)

To learn more or schedule a free consultation, click here to get started today:

<https://www.irinashea.com/our-process>

