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Estate Planning

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DO BENEFICIARY DESIGNATIONS OVERRIDE MY WILL OR TRUST?

- 1- YES, so be careful and be aligned
- 2- Will/Revocable Living Trust that has continuing trusts for children
- 3- Payable on Death “POD”/Transfer on Death “TOD”/Beneficiary designations outright to various people
- 4- Keep the beneficiary designations current/aligned/coordinated or removed
- 5- + simplicity/quick access after death
- 6- - don’t account for sequence/scenario/trusts
- 7- Child A in trust if not to Child A’s children in trust or if none to Child B
- 8- Larger dollars – simple POD/TOD
- 9- Child A is not living successor (?) may revert to estate

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

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