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PRACTICING EXCLUSIVELY IN
ESTATE PLANNING · PROBATE · TRUST ADMINISTRATION
CONSERVATORSHIPS · TRUSTS & ESTATES LITIGATION

No Federal Estate Tax, No Problem?



The 2015 federal estate tax exemption will rise to \$5.43 million per individual (from \$5.34 million in 2014) due to an inflation adjustment. This means only about 3,700 estates, or 0.12% of the total, are expected to owe federal estate tax this year.

But don't be fooled. Regardless of federal estate taxes, issues of personal dignity, family conflict and your life's legacy are fundamental to proper estate planning.

Your Personal Dignity

Important decisions affecting you must be made, despite your lack of legal capacity, including the payment of bills or taxes. At 18, an adult must appoint agents through proper Durable Powers Of Attorney to make personal, health care and financial decisions in the event of incapacity. You can legally prepare to ensure that your wishes are honored should the worst happen.

Avoiding Family Conflict

20 percent of Americans age 50 and over in an AARP/Scudder Investment Program study cited problems among surviving family members due to their inheritance. Fortunately, the laws of most states provide solutions for the specific distribution of cash and tangible

personal property. Communicating these solutions is key and making updates to documentation to match changes in situations or goals.

Protecting Your Legacy

Proper planning can ensure your family is provided with a thoughtfully prepared, efficiently implemented and effectively administered estate plan that protects your legacy at death and for generations to come.

About Those Taxes ...

As of January 1, 2015, 19 states and the District of Columbia will collect a state death tax. State death taxes, which kick in for estates valued at only \$1 million or less in several states, could take a big bite out of your legacy. Also, be aware that many states impose a nonresident estate tax on real and tangible personal property situated within the state. So even if you reside in a state without a death tax but own property in another state, death taxes could still be an issue.

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