



# AMERICAN TAX RESCUE

## ESTATE PLANNING

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#### The definition of Estate planning is:

- I want to control my property while I am alive and well.
- For the benefit of me and my loved ones i want to plan for my possible disability.
- I want to give what I have to whom I want, when I want, and the way I want.
- All at the lowest possible overall cost to me and to those I love.

#### UPC Business Group offers a complete program for your Estate Planning, including;

- Distribution of Assets Upon Death
- Intestate - Without a Will
- Testate - With a Valid Will
- Joint Tenancy \Two or more owners, each with full rights of ownership
- Contract or Beneficiary Designations
- Life Insurance
- Pay on Death (POD) accounts
- Partnerships and other Business Arrangements

#### Trust

- Property titled in the name of the trust; trust instrument sets out terms of distribution

#### Probate

- The Court supervised collection and distribution of the property of a decedent, after legal obligations are paid
- Court supervision of the property of an incapacitated person

#### Living Trust

- Creator of the trust is also the Trustee; therefore, you keep control of the property held in the trust until, your death or your disability

#### Taxes

What property is subject to tax is a separate issue from how your property is passed at your death

- Estate Tax
- Income Tax

### CONTACT US FOR MORE INFORMATION



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