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Estate Planning Vs. a Will

By Carson M. Hearst

July 1, 2026 | **TRUSTS AND ESTATES**

A Will is one document, while an estate plan is a full package. A Will directs who gets your assets after you die and usually names guardians for minor children, but it only takes effect at death and must go through probate in New York's Surrogate's Court. An estate plan is a broader strategy that typically includes a Will, sometimes a trust, a power of attorney, a health care proxy, and a living will. Undertaking estate planning also includes examining how any assets you may own jointly are titled and reviewing any accounts with named beneficiaries. Think of the will as one piece of the overall estate planning puzzle.

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