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How Do You Do Estate Planning?

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The best approach is to work with an estate planning attorney. Each state has very specific requirements for a Will to be considered valid and also has separate requirements for any ancillary documents such as a Power of Attorney, Healthcare Proxy, and Living Will. Errors in execution can void a document entirely. A qualified attorney will review your family situation and assets, recommend the right combination of documents, draft them in compliance with your state's law, and guide you through proper signing and funding if necessary. Once your plan is in place, you should review it every three to five years or whenever you experience a major life change.

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