

Trusts & Estates Seminar | Amelia Island, Florida | March 21, 2023



February 19, 2023 | **EVENTS**

Are you ready to make the important decisions to plan, protect, and preserve your estate?

Now is the time to prepare. Please join us for a complimentary seminar. [Register Here](#)

March 21, 2023

Registration: 2:30-3:00pm

Program: 3:00-4:30pm

Amelia Island Ritz-Carlton
4750 Amelia Island Pkwy
Fernandina Beach, FL 32034

Join our speakers for an informational seminar providing the latest information, basic principles, recent developments, and best practices to design a plan that suits your family's interests and needs.

This seminar will provide you with strategies that may help you navigate through the challenges, issues, and opportunities involved with estate planning in today's economic environment.

- Why and when to update documents including Last Will and Testament, Revocable or Living Trust, Designation of Health Care Surrogate, Power of Attorney, Living Will, and Declaration of Preneed Guardian.
- The right and wrong ways to designate your beneficiaries.
- Methods to properly control the distribution of your assets.
- Important steps to avoid costly and time-consuming probate proceedings.
- Overview of Florida's new trust laws for Spousal Lifetime Access Trusts ("SLATs")

Other informational updates:

- 2023 Exemption and Gift limits
 - Florida Residency and Domicile Factors
 - Florida Homestead Exemption
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Light refreshments provided.

Related Team



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