

Trusts & Estates Seminar | Thursday, March 21 | 1:30pm-6:00pm



January 8, 2024 | **EVENTS**



Please join us for a

TRUSTS & ESTATES SEMINAR

Presented by  **LippesMathias**
ATTORNEYS AT LAW

Thursday, March 21st, 2024
1:30 - 6:00 PM

Renaissance St. Augustine Historic Downtown Hotel
6 West Castillo Drive
St Augustine, FL 32084

[Register Here](#)

Join our speakers for a free seminar providing the latest information, basic principles, recent developments, and best practices to design a plan that suits your family's needs. This seminar will provide you with strategies that may help you navigate the challenges and opportunities involved with estate planning in today's economic environment.

Topics Include:

- 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.
- Important steps to avoid costly and time-consuming probate proceedings in Florida and in other states.
- The right and wrong ways to designate your beneficiaries.
- Re-titling your assets to be consistent with your estate plan.
- Methods to properly control the distribution of your assets to children and other generations.
- Understanding federal estate tax laws.
- Exploring residency planning, including how to establish Florida residency and cut ties with your former state of domicile.

Related Team



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