



IT'S YOUR LIFE

Estate Planning Mistake: Saving Money by Not Getting Advice

Low cost (or free) forms are readily available online, but using them for your estate plan is a clear example of “you get what you pay for.” Is a simple will sufficient, or should you utilize a trust? Is your estate large enough to require specialized planning to minimize estate taxes? Do-it-yourself estate planning seems straightforward enough, but is the potential for an estate planning disaster worth the risk? Legal documents vary by state and generic documents may not fit with your unique situation. Spending a small amount for advice from a competent attorney now will not only give you peace of mind that your estate plan is set up properly, but could save your family a large amount in legal fees and other costs later.

Federated offers a professional, team approach to estate planning and business succession. Call us to learn how you can take advantage of our network of independent estate planning attorneys. Each of them is highly trained in the area of business succession, and is ready to help make the process easier and less stressful for you.

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