

Estate Planning Made Easy

What exactly is an Estate Plan?

After years of hard work and building your estate, you deserve to make sure it is secure! An Estate Plan allows you to be intentional with designating certain assets to the people you want to receive them.

Wills vs. Trusts. Which one will I need?

Is a Will good enough for my situation or do I need a Trust? This is an important choice when moving forward with securing your family's legacy. It is a common question we get asked when clients call to schedule their consultations. Here is an easy breakdown of the two to help guide your decision.

What is a Will?

A Will is a legal document, which designates who you want to receive your assets. All Wills have to be filed with Probate Court. With a Will, you assign an Executor who will be responsible for ensuring your assets are distributed as quickly as the Probate Court process will allow. A Will is great for families or individuals who have minimal assets or own assets that would not have to go through the Probate process. However, this does not guarantee that your Will would not need to go through the probate process, and more often than not, it does.

What is a Trust?

A Trust is a legal document that gives you and your family total assurance and peace of mind knowing family wealth and assets will be transferred to heirs with the most ease and convenience possible. Through a Trust, Probate Court is not involved, resulting in your family not having to spend extra time and money wrapped up in a long, and often, drawn out court process. Unlike what many people may believe, you do not have to have millions of dollars and multiple properties in order to need a Trust. A Trust simply provides peace of mind knowing that your loved ones will stay out of court, and all of your affairs will remain totally private.

Read more about the differences between Wills & Trusts in our "Benefits of a Trust" and "What is a Will" documents in your consultation packet or on our website.

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