

Can we help

Estate Planning

Yes!
we can...



Estate planning is the process of transferring a person's estate during life and/or death to their heirs. The goal of most estate plans is to ensure that assets and property are distributed at death according to the wishes of the estate owner and to limit estate tax implications on the heirs so the estate is not destroyed. Estate planning uses tools such as wills and trusts to protect and preserve a person's estate.

A person's estate can include things like bank accounts, securities, other assets, automobiles, equipment, jewelry, furniture, and various other forms of personal property. The estate may have real property such as land and/or homes inside it as well. Also taken into account is a person's business, this may be housed in the estate depending on how the business is registered; a business registered as a sole proprietorship for instance would be considered individual property in a person's estate.



With so much at stake, why do we avoid planning?

- No one takes pleasure in facing their mortality
- Misconceptions that estate planning is complicated and lengthy
- Maybe you think you don't need an estate

It is not uncommon for many people to not have estate plans. Whether it is: the eminence of mortality we are avoiding, reluctance because we believe that estate planning is a complicated and lengthy process, or the simple belief that we don't need an estate plan, many of us pass up the opportunity to protect our families by planning for the future.

What is your reason to plan?

Whether it is your spouse, children, brother(s), sister(s), neighbor, employee(s), or friends we all have a reason to plan. Estate plans can answer the difficult questions for your loved ones like: who are your beneficiaries, how and when will transfers of assets and property take place, and how are the assets and property to be divided? Planning protects your beneficiaries from the potential stress, anxiety, worry, and financial distress that can result from probate and/or taxes implications.

Do you want to leave a legacy for your family? Estate planning can make sure that future generations of your family are taken care of, leaving a lasting living legacy you created.

“ Planning is bringing the future into the present so you can do something about it now.” –Alan Lakein

It's your journey, why not have a guide?



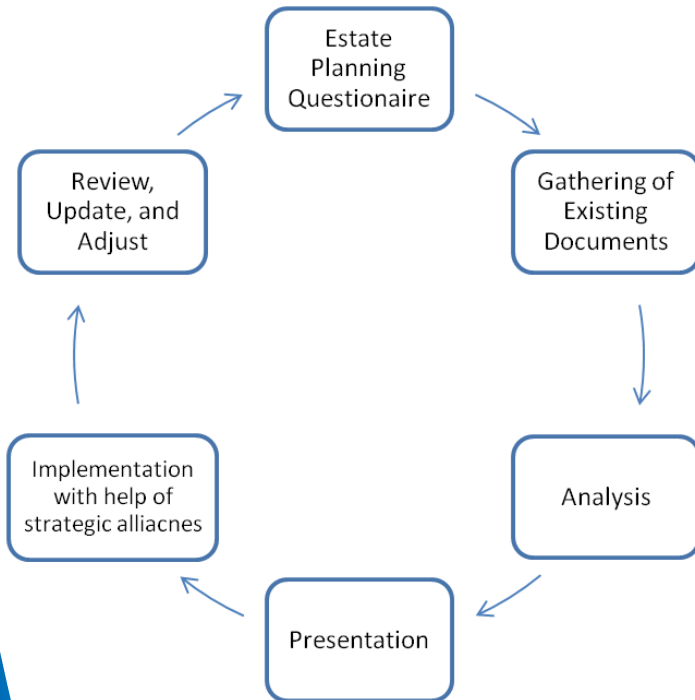
Your financial needs are distinctive to you, and no two people are the same. So as you embark on this great journey, why not take an experienced guide to help you along the way? Someone who knows the paths, plans ahead, and ultimately takes your journey to the next level.

Retirement Concepts Group, LLC is uniquely positioned through our strategic alliances to provide comprehensive financial and estate planning. Our goal is to help our clients implement an effective wealth preservation strategy that allows them to **protect, preserve, and pass on** what they have worked so hard to achieve.

Our team has over 80 years combined experience in estate planning and wealth preservation. We recognize that each situation is one of a kind and we work with you toward your goals to help you build your estate and create the estate plan that is right for you.



How do we start?



It can be overwhelming to start the process of estate planning by your self, at Retirement Concepts Group, LLC we have procedures that help walk each client through the estate planning process.

Our tools, resources, support, and products make the planning process as simple as possible, to tackle this sometimes daunting task.

Yes! Start your journey
we can...

Contact us to start your estate planning journey, and we will guide you to a plan that is as unique as you are.

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