Don't Wait to Call an Estate Attorney

A (very brief) YRP Capital Group Guide for Clients Who Want to Make Sure Their Stuff Goes Where They Want it to Go When They Die

Most Folks Do It Backwards

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Most people put off estate planning until it's too late—or they think that a Will they made 15 years ago still does the job. That can lead to:

- Expensive, drawn-out probate
- Family members fighting over money and possessions
- Tax surprises that shrink inheritances
- Loss of control over what happens to their wealth

Make Your Estate Attorney the Legacy Protecting Hero (or Heroine)

What's the worst thing that could happen?

- Lower Taxes – Keep more of your money in the family
- Less Probate – Avoid months or years in court
- More Control – Decide who gets what, no arguing
- Peace of Mind – Know that what you want will actually happen
- Family Peace and Harmony – Reduce stress and conflict

Some Examples of Quick Wins from Real Families

- Avoided a year's worth of probate court trips with a trust
- Prevented a blended-family inheritance fight
- Saved thousands in taxes through real planning (think generation skipping strategies
- Made sure a business transitioned smoothly
- Held a family meeting to work through sentimental family items/issues

Why People Put It Off

- "Trusts are only for really rich people"
- "My kids won't fight"
- "I don't want to give a lawyer or someone else control of my assets"
- "It feels uncomfortable to talk about."

Truth: Waiting only makes it harder and more expensive later.

Ok, so I need to talk to an estate attorney. What are the next steps?

1. Let's schedule a planning meeting. We will introduce you to a trusted estate attorney that we work closely with.
2. Gather your key information—accounts, property, business interests. By the way, we already have most of this information if you are a YRP client.
3. Work with us to align everything (beneficiaries, taxes, trusts) so your plan actually works.

The Bottom Line:

You've worked hard to build what you have—don't leave its future up to chance. Proactive estate planning protects your wealth, reduces stress, and keeps the peace in your family. If you don't have an estate attorney you trust, we'll gladly connect you with one.