

Estate Planning Tips

1st October 2020

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Consult with an estate planning solicitor.

They can help you decide on the best plan for your situation, including complicated matters such as choosing an executor, advance directives, power of attorney, reducing taxes after death, and more.

Make a will.

A valid will makes sure that your property will be left to the people and places you want it to after your death. If you have children under age 18, consider naming a guardian in your will to care for the children.



Choose an executor.

The executor of your estate—the person you choose to carry out the terms of your will—should be responsible, detail-oriented, and willing to serve in this role. Choose them carefully.

Make a list for your executor.

Include contact information for immediate family and friends, your doctors, financial adviser, lawyer, and the location of vital documents such as insurance policies, safe-deposit boxes and keys, and your bank and brokerage account numbers. Tell your executor where the list is kept.



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