

Estate Planning for Busy People!

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Estate planning and procrastination often go hand-in-hand. This session will provide tools to help you understand the benefits of estate planning-- including maintaining estate control, how this helps your heirs, ways to avoid or minimize probate, and methods that save on estate taxes.

We will discuss special situation such as a blended family or new marriage and how Florida's Elective Share statute or Homestead Act can affect your estate plan.

Additionally, we will briefly discuss special needs trust and spendthrift trusts for those special family members. You will be introduced to the four basic estate planning documents: Will, health care surrogate, durable power of attorney and living will. In discussion, attendees will weigh the costs and benefits of a will versus revocable trust and explore the difference of both documents and how your choice today can affect your heirs tomorrow.

Dates: Wednesday, October 28, 2020 & February 17, 2021

Time: 5:00PM – 6:30PM

Location: Virtual WebEx Meeting

Seating is limited, please register at <http://catalog.ocps.net/> to receive the WebEx email invite

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For additional information, call 407-317-3227 or email: Retirement.Services@OCPS.net

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