

Understanding What An

# ESTATE PLANNING

ATTORNEY DOES

**MORGAN LAW OFFICES, LLC**

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# Welcome

Thank you for considering me in the extremely important legal process of estate planning.

It is often difficult to discuss estate planning because we naturally associate this topic with death and the sorrow that we have experienced with the passing of our loved ones. However, estate planning encompasses much more than death and the final distribution of property.

An effective estate plan involves consideration of life-changing events such as the economic impact to young adults and their growing families, the preservation of hard earned wealth in the face of economic downturn or devastating illnesses, and the allocation of financial resources for our spouses and children when we are no longer able to meet their needs.

At Morgan Law we will begin this important process with a free consultation. We will then take the time to work with you and to understand and implement your estate planning goals. We will meet your objectives rather than simply proposing a boilerplate legal solution.

Our motto is "Excellence, Integrity, and Justice." At Morgan Law we take great pride in exceeding your expectations.

*Kelly M. Morgan, Esq.*



# Understanding What An Estate Planning Attorney Does



As unpleasant as it can be to think about the end of your life, failing to do so can cause even more grief and misery for your family once you are gone. Passing assets on to loved ones can be complicated and does not always come easy. In addition to the laws that govern the process, you might also be forced to deal with emotional issues within your family. Many of the problems that come from settling the estate of a loved one can be avoided by planning your estate well in advance of your death.

You want to preserve your hard-earned assets for your needs and those of your family when you are no longer there for their support. It is important to make this transition as seamless as possible with minimal additional stress for your loved ones. The best way to avoid the “worse-case scenarios” is to work with an experienced and competent estate planning attorney. They provide a broad range of services that can be tailored to suit your specific circumstances, no matter how diverse or unique.

What does an estate planning attorney do?



# Understanding What An Estate Planning Attorney Does



## Assists with Retirement Accounts and Planning



Most people have some sort of retirement savings, either a 401(k), IRA, pension, or combination of various accounts. You might also have other investments or a valuable insurance policy. It can be beneficial to put these assets into a trust or to understand how to best manage this property in another entity or form of ownership that provides protection. This allows the assets to transfer directly to your beneficiaries in the least difficult manner possible, as opposed to getting stuck in probate for weeks, months, or even years. Avoiding probate is one of the greatest benefits an estate planning attorney can provide.

## Disbursement of Property

Do you have a plan for distributing property to your loved ones? You should! Without a plan in place, all of your assets will be handled by a probate attorney. Many people assume that if they place financial accounts into a trust or put their loved ones' names on the accounts everything will be fine. Unfortunately, this does little to protect assets from the grantor's creditors, but there are tools to maximize protection for both the grantors (person creating the trust) and beneficiaries, persons succeeding the grantor in the enjoyment of the real or personal property. You need a complete plan for property disbursement and an estate planning attorney can help you create one.



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An estate planning attorney can also help you create specialty trusts. There are different options that are ideal for different situations and there is no such thing as a one-size-fits-all trust. Working with someone who takes the time to understand your circumstances and recommends tools that are perfect for you ensures your estate is properly planned.

## Create a Legal Arrangement that Honors State Laws



Finally, an estate planning attorney ensures any arrangement you do create for your estate is legal and meets statutory guidelines. Your attorney can assist you with developing a plan that will enable your family to minimize the need for probate court supervision. This will avoid unnecessary time and expense.

An experienced attorney ensures government regulations are met and your estate is not hung up in probate at all or for any longer than absolutely necessary. The last thing you want is for your loved ones to be forced to deal with the burden of avoidable delays within the legal system when they need to be and should be mourning their loss.

Not all estate planning attorneys are the same and some handle only a portion of what is on this list. Others can help you with legal issues above and beyond planning your estate. The key to finding a good estate planning attorney for you is to shop around – contact, interview, and research your options until you find someone who makes you comfortable and offers all of the services you need.



# Understanding What An Estate Planning Attorney Does



A few things to consider when searching for an estate planning attorney include:

- Finding someone local who understands state regulations
- Finding someone who shares your communication style
- Finding someone who puts you at ease and makes it easy to explain your circumstances
- Finding someone who is familiar with any unique or unusual details related to your estate
- Finding someone you can trust with a strong reputation in the profession
- Finding someone who emphasizes a focus on estate planning, as opposed to just preparing wills or trusts on an occasional basis.

Kelly Morgan understands the anxiety and uncertainty that accompanies the events leading clients to his door. He is responsive and sensitive to his client's concerns, whether those legal matters involve matrimonial issues, life and estate planning, complex business transactions, or other issues.

He strives to meet the needs of clients and to exceed their expectations, and is committed to achieving client objectives through dedication, hard work, and a focus upon professional excellence.

To learn more or to speak with someone about your estate planning needs, contact Kelly at 614.221.6837 or by email at [kmorgan@morganlawohio.com](mailto:kmorgan@morganlawohio.com).

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