

# Woodall Agency

I n s u r a n c e

*Professional. Confidential. Personal Service.*

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## Estate Planning Needs Evaluation

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You have worked hard to build your estate. Wouldn't you like to remain in control of where it goes? If you don't have the right plan in place your estate may be subject to estate taxes and the IRS could be a major beneficiary. Wouldn't you prefer those funds to be left for your family or a charity of your choosing?

1. What is happening with the estate tax? The total marital exclusion is 10 million dollars right now. ***Will your heirs have to pay estate taxes if we revert back to prior legislation?***
2. Do you need to establish a trust for estate preservation?
3. If the rules change again, is your current plan going to work? Your insurance agent can help you understand current legislation as well as assist in planning for the future.
4. I want my heirs (or a charity of my choosing) to inherit my estate, ***not the IRS***. How can I make that happen?

