

Estate Planning

Successful estate planning allows for the transfer of your assets to your beneficiaries quickly and usually with minimal tax consequences. Unfortunately, people do not want to envision a day they won't be around to care for their families. But without proper estate planning, you could end up actually hurting the ones you love – emotionally and financially. After all, estate planning is not only for the wealthy, but for the benefit of your heirs.

With help from Kennedy and Coe, you can ensure that your family – and not the federal government – is the primary beneficiary of your estate, avoid exposing your assets to a divorce settlement and eliminate potential strain on your family. Our experienced consultants can help you prepare your business and the rest of your estate, so that when the time comes, each step in the succession process will go as smoothly as possible. With plans designed to meet your unique needs, every detail of your estate will be closely examined – no matter how simple or complex it might be.

At Kennedy and Coe, each of our estate plans has five primary goals:

- To transfer assets according to the family's wishes
- To protect an estate's net worth from unnecessary estate taxes
- To provide an orderly management transition
- To provide financial security for family members
- To protect the estate from potential creditors

Many times, estate planning means jumping around from place to place as you assemble the information required to draw up a plan. At Kennedy and Coe, we have all the knowledge and expertise you need within one company – everyone you need to put the pieces of your estate plan together and keep your business on the right track.

Call 800-303-3241 for more information.