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the cost of long-  
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control over it and plan for its ultimate disposition. This includes preparing wills and trusts to distribute your estate after your death.

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with complicated  
acronyms like

“GRATs,” “ILITs,”  
or “QPRTs” often

require your  
attorney, financial  
advisors, and tax  
professionals to  
work together. So it  
can be beneficial in  
some cases for  
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advisors to meet

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Financial Planning

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Estate Planning is  
so important  
because failing to

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make plans for your Estate can lead to unintended consequences for your beneficiaries, including the loss of wealth through paying unnecessary Inheritance Tax and Care Fees or if the event of a Divorce or relationship breakdown.

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