

Flow Chart of Estate Planning Choices

A commonly used definition of Estate Planning is: "I want to control my property while I'm alive, take care of myself and my loved ones if I become disabled, and give what I have, to whom I want, the way I want, and when I want. Furthermore, if I can, I want to save every last tax dollar, professional fee, and court cost legally possible."

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Estate Planning

Incapacity Planning

Creditor & Predator Protection

Financial Control

Medical Decision Control

Health Care Wishes

Access to Information

Family Maintenance

Dependent Protection

Long-Term Care

Income Replacement

Minor Guardianships

Young Adult Protection

Spendthrift Protection

Special Needs Planning

Creditor & Predator Protection

Family Harmony

Incenting Conduct

Preservation of Values

Wealth Transfer Planning

Streamlined Transfers

Reducing Administration Delays

Reducing Costs of Transfers

Avoiding Family Conflict

Elimination of Taxes

Protecting Unique Assets

Preserving Asset Values

Maintaining Privacy

Eliminating Court Intervention

Beneficiary Divorce Protection