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KEY FIGURES

• \$13,610,000 - 2024 Gift, estate, and GST exclusion amount

• \$18,000 Annual Gift Tax Exclusion



INCAPACITY PLANNING DOCS

Powers of Attorneys, Living Wills, and HIPAA release forms are all examples of documents that can help ensure your affairs continue to be carried out in case you become incapacitated.



BENEFICIARY DESIGNATION

Titling of property and accounts along with the designation of beneficiaries should be coordinated with the rest of your estate plan.



ESTATE PLANNING TOOL KIT



REVOCABLE LIVING TRUSTS

While not necessary for everyone, they can be useful tools in:

- Smoothly transitioning control of assets upon incapacity
- Transferring assets in a more private manner
- Avoiding probate in other states where you own real estate

TEAM OF PROFESSIONALS

Having a group of qualified professionals (e.g. Attorney, CPA, Financial Advisor*) collaborate on your behalf and customize your estate plan may help increase the likelihood of a smooth transition of your wealth to your loved ones. Consider consulting with them as your goals and situation changes.

*Investment advisory services offered through Apeiron RIA, LLC.

WILLS

Wills help disburse property to heirs at your death and help guide the probate process according to your wishes. If you don't have one, state law will decide how your property is disbursed.

ENHANCED ESTATE PLANNING TOOL KIT

For estates over \$13,610,000 in 2024, we may utilize a deeper tool kit. Blended families and individuals with charitable goals may also benefit from additional estate planning strategies/tools.

