Estate Planning Basics

Even if your estate is not large, you should still have a basic estate plan in place. However, with all the various considerations specific to each family, there is no one-size-fits-all estate plan. Join us to learn more about:

- What documents everyone should consider having?
- Lifetime planning for incapacity: medical decisions and asset management?
- The impact of making lifetime gifts or passing assets at death?
- Whether your assets are titled properly?
- Planning with retirement assets?
- Whether you are or will be impacted by estate tax?

Remember, proper planning is a gift to your family and loved ones that will ease their burden during a difficult time.

Register today for this live webinar on Tuesday, May 12, from 12 p.m. to 1 p.m. (ET).

Featured speakers:

**Jim Alverson, CFP®**
Director, Wealth Planning Strategies
TIAA Individual Advisory Services

**Daniel C. Bollini**
Director, Wealth Planning Strategies
TIAA Individual Advisory Services

As Directors of Wealth Planning Strategies for TIAA, both Jim and Daniel provide wealth transfer, estate and tax planning considerations for clients with the most complex needs. Their estate and tax planning knowledge and background allow them to provide specialized financial advice and sophisticated planning strategies to high-net-worth families in every aspect of their financial lives.
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