

Are you curious about creating your first Estate Plan, or considering updating and evaluating your current plan?

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Crafting an Estate Plan isn't just a task; it is an art. Imagine investing your precious time in designing a plan meant to shield your loved ones, only to pepper it with blunders that later serve as a source of stress, significant expense, and turmoil. For most of us, grasping the complexities of estate planning can seem intimidating, but with knowledgeable support, you can easily avoid common mistakes.

The ultimate goal is to create a smooth path, not a complicated puzzle.

So, whether you are drafting your first estate plan or revising an existing one, now is the perfect time to immerse yourself in the nuances that could cause stumbles.

We have created a guide to focus on the common mistakes and how to avoid them. This knowledge will empower you to sculpt a seamless plan that not only mirrors your vision but also fortifies the legacy you wish to protect.

In our guide, we focus on the following:

1. **Failing to Plan.** The biggest mistake you can make when it comes to your Estate Plan is simply not making the time to do it.

2. **Not Discussing with Family.** Creates a likelihood that there will be contention or disagreement after your passing.

3. **Naming Just One Beneficiary**

4. **Forgetting about Power of Attorney or Healthcare Proxy.** Who would step in to make decisions should you become incapacitated?

5. **Forgetting about Final Arrangements.** Make sure your wishes for end-of-life care are known.

6. **Forgetting about Your Digital Assets.** The idea of digital estate planning is relatively new, but it makes sense, given the technological world we live in

7. **Forgetting about Charities that are Important to You**

8. **Not Thinking about Your Children's Futures**

9. **Getting Too Specific**

10. **Improperly Funding Your Trust.** Creating a Trust is only half the battle—it is useless until it is actually funded.

11. **Forgetting about Taxes.** If you live in Massachusetts, you may be impacted by estate taxes if your total estate exceeds \$2 Million.

12. **Not Securing Your Estate Plan.** Having the best Estate Plan in the world will not accomplish anything if your heirs cannot find it.

13. **Updating Your Plan Too Infrequently**

This guide is not just a checklist; it is a deep dive into the art of crafting a plan that truly protects and honors your legacy—without the blunders.

Each section of our guide is designed as a stepping stone to help you create a plan that considers every possibility, ensuring that nothing is left to chance.

This free guide is meant to be simple and straightforward, helping you plan for possibilities you may not have considered.

Take control of your estate planning now to secure peace of mind for everyone in the future.

Send us an email to jmoniz@supremealliancecellc.com to get your copy of our free guide.

Our exclusive **Legacy Vision Approach™** helps you achieve the legacy you envision for yourself, your family, and your community.



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