

## *Estate and Legacy Considerations*

Tuesday, October 2, 2018 7:00PM

***When it comes to your estate, even if you've taken no action at all, you have an estate plan.***

Your "default plan" may be determined by the laws of your state rather than by what you would like to leave behind as your legacy. Furthermore, if you don't consider your estate to be large or complicated enough to warrant the effort and cost of estate planning, the effort and cost of probate may make your heirs wish you had.

Please join us in discussing strategies to consider when planning your estate. These strategies include:

- \* Minimizing the tax consequences of inheriting for your beneficiaries
- \* Preparing for the care of your dependents should anything happen to you
- \* Preparing for your own care should you not be able to make decisions about your finances or medical care
- \* Avoiding probate for your beneficiaries



### *Presenters:*

***Financial strategy:*** Chelsi Dildine is a Financial Advisor with Edward Jones. Her practice focuses on long-term financial strategies for individuals and small business owners, assisting her clients in balancing and achieving their financial goals, such as retirement, business growth, and wealth transfer.

***Tax consideration:*** Christine Searle, owner of Searle Business Solutions, LLC, is a tax professional and financial control specialist with more than 30 years of experience preparing income taxes and resolving tax issues for individuals, businesses, estates, and non-profits.

***Making it all legally binding:*** Jennifer Schiffer is a graduate of Vanderbilt University where she earned her B.A. in Economics and her J.D. Jennifer is a shareholder of Bean, Kinney, & Korman. Jennifer's practice focuses on business succession planning, estate planning, and estate administration.

**Location: Bean, Kinney & Korman**

**2300 Wilson Blvd., 7th Floor**

**Arlington, VA 22201**

**\*\*\*Street parking is free after 6:00 pm**

**There is limited space, so please RSVP for yourself and your guests to [chelsi.dildine@edwardjones.com](mailto:chelsi.dildine@edwardjones.com) by September 25, 2018.**

**If you are interested but cannot attend, please contact Chelsi at the above email to confirm if other arrangements can be made.**