

7 REASONS TO CONSIDER A TRUST FOR YOUR FAMILY

HERE ARE 7 TIPS TO
CONSIDER WHEN PLANNING
FOR YOUR FAMILY



VARELA LAW
estate planning & family legacies

SO MANY PEOPLE THINK TRUSTS ARE ONLY FOR THE WEALTH OR SUPER-WEALTHY. **THAT'S NOT THE CASE.**

THERE ARE A NUMBER OF REASONS WHY TRUSTS CAN ALSO BE USEFUL FOR MIDDLE-CLASS FAMILIES. HERE ARE 7 OF THEM:

1

Control distribution of assets.

You wouldn't hand over your car keys to a child who has had no proper preparation for driving, and chances are you would not want to hand over all your assets to a teenager either. But if both parents die at the same time, the children would inherit all the assets upon their 18th birthdays. A trust allows you to specify how and when you want your children to inherit.

2

Protect assets from creditors.

Placing an inheritance in a trust ensures that those assets are protected from your heir's – or their spouse's – creditors. Consider a Lifetime Asset Protection or Wealth Creation Trust.

3

Protect inheritance from spendthrift heirs.

Not everyone is good with money. If your heirs fall into that category, you can use a trust to ensure the assets are not frittered away due to spendthrift behavior.

4

Protect inheritance for children of prior marriage.

You can use a trust to both provide for your current spouse and any children from a previous marriage.

5

Provide for a special needs heir.

Leaving assets outright to an heir with special needs could disqualify them from receiving important government benefits. Leaving those assets in trust bypasses this potential risk.

6

Avoid probate.

Assets can pass to heirs without going through probate by using a trust, saving beneficiaries the time and expense of the probate process. Probate is an expensive, public and unnecessary court process you can keep your family from having to deal with.

7

Protect privacy.

Once a will is entered into probate, it becomes public; a trust is a private document that will protect your family's privacy.

Do you have any questions about whether a trust is right for you?

We can discuss the best options for you and your family. And because I believe this planning is so important - I've included below a Certificate for a complimentary "Family Legacy Planning Session" for your family.

I AM PASSIONATE ABOUT MAKING SURE THAT YOU HAVE PLANNING THAT WORKS FOR YOUR FAMILY -- BOTH NOW, AND IN THE LONG TERM.

The bad news is that I'm only able to schedule two of the complimentary Sessions per month because I devote a substantial chunk of my time to existing clients.

If you would like to be one of the two people I meet with at no-charge, please do contact or email us now. When you do, make sure that you include that you would like to schedule a session and that you have a Certificate. Until then, and to more of your assets "staying home"!

Warmest regards,

Alex Varela, Esq.

PS: Your certificate and details about what you'll discover during your Family Legacy Planning Session begin on the next page.







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NO-CHARGE FAMILY LEGACY PLANNING SESSION

(A \$750 value)

If you own a home and have minor children, and are one of the first 2 families to schedule an appointment this month for a “Family Legacy Planning Session” - I will waive our regular \$750 planning fee.

DURING YOUR TIME TOGETHER, YOU AND YOUR SPOUSE WILL...

| | | |
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| Get your financial house in order and keep it that way |  | Choose the right guardians for your kids, avoid making one of the six common mistakes most parents make (or fix mistakes already made) |
| Keep your family out of court & legally avoid all estate taxes |  | Confirm you are making smart financial choices about things like saving for college, keeping your money safe and buying life insurance |
| Discover how to leave your loved ones a gift far greater than all the money in the world ...truly. |  | Learn the #1 best way to protect your kids' inheritance from a future lawsuit, creditor, predator or divorce |
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VISIT WWW.VARELALAWOFFICES.COM & SCHEDULE YOUR PLANNING SESSION

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