



THE MACLEAN LAW FIRM, P.C.

*~ Probate ~ Estate & Trust Administration ~ Related Dispute Resolution & Litigation ~
~ Estate Planning ~ Asset Protection ~ Business Succession ~ Elder Law ~ Private Client Services ~*

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WE HELP PEOPLE ENFORCE THEIR RIGHTS, PROTECT THEIR ASSETS AND PLAN FOR THE FUTURE.™

YOUR GOALS AND OBJECTIVES

- Ensure that you and your spouse have sufficient assets to maintain your standard of living now and in retirement.
- Maintain maximum control and flexibility during your lifetime.
- Provide for your income, protection and medical care in the event you become disabled.
- Simplify the administration of your estate as much as possible upon your death or disability, including avoiding probate and guardianship.
- Avoid having your private matters made public unnecessarily.
- Ensure that only the efforts you desire are used to save or prolong your life.
- Have your property continue to benefit the surviving spouse after one of you dies.
- Protect your assets so that they cannot be used or wasted after you die in the event your spouse remarries.
- Ensure that the persons you select in fact become guardians of your minor children.
- Ensure that your children or grandchildren's inheritance does not render them ineligible for government benefits such as Medicaid.
- Structure the inheritance your children or grandchildren receive from you in such a way that it is protected from future claims by their spouses or their creditors.
- Protect your children or grandchildren's inheritance from waste or mismanagement.
- Structure your children or grandchildren's inheritance in such a way that it instills values and virtues important to you.
- Educate your children and grandchildren.
- Benefit your community or a cause that is important to you.
- Reduce the risk of litigation by heirs who receive less than they think they are entitled to.
- Protect against your estate passing unequally (or not as you intended) due to the nature of the assets you own.
- Provide for your parents if they need financial assistance (without disqualifying them from any government assistance programs).
- Avoid unnecessary business expenses or failure due to a lack of a business succession plan.
- Avoid your estate having to sell business or personal assets at "fire sale" prices in order to create liquidity required to pay estate taxes and expenses.
- Protect your investment assets from loss resulting from frivolous law suits.
- Minimize your and your estate's income taxes.
- Avoid or minimize capital gains taxes.

Reduce or eliminate estate taxes as much as possible.

Other goals, objectives and concerns important to you:

For more information, to request a consultation, or to engage the law firm, please contact us at 212-682-1555 or by email at info@maclean-law.com.

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