MERITAS ADVISORS

Comprehensive Wealth Management

What You Need To Know About Estate Planning To Protect What You Cherish Most

***When*:** **Wednesday, February 12, 2014**
12:00 pm – 1:00 pm
Lunch will be served

***Location*:** **Napa Conference Room**
4040 Civic Center Dr., Suite 200
San Rafael, CA 94903

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Estate planning attorney Nadine Aarsheim will answer the questions clients most frequently ask her, including:

- “Estate planning” sounds depressing and complicated. Can’t I just skip it?
- Why wouldn’t I just pass my property to my surviving spouse? S/he’ll know what to do.
- Why wouldn’t my spouse and I want our kids to have full control over the money we leave them as soon as we pass away? I don’t want to be a control freak about it.
- If I leave money in trust for my kids, should the trustee of the trust be the guardian?
- I know I’m supposed to avoid probate of my assets, but I’m not sure why…
- What’s the difference between a “power of attorney” and a trust?
- What’s the difference between a will and a trust?
- Q&A to follow

Aarsheim Law

Estate Planning for Families