



# ESTATE PLANNING

“ESTATE PLANNING WITH GEVURTZ MENASHE IS PAINLESS, HELPFUL AND ABOVE ALL ELSE, PROVIDES A POSITIVE SENSE OF RELIEF THAT MY LOVED ONES WILL BE CARED FOR.”



SINCE 1982

HAVING A PROPER ESTATE PLAN IN PLACE GIVES YOU PEACE OF MIND BY PROTECTING THE PEOPLE AND THINGS YOU CARE MOST ABOUT. OUR ESTATE PLANNING TEAM IS DEDICATED TO HELPING YOU ACHIEVE YOUR GOALS THROUGH COMPASSION AND FIRST-CLASS REPRESENTATION.

## WHAT IS AN ESTATE?

Your estate is comprised of everything you own—your car, home, other real estate, checking and savings accounts, retirement accounts, investments, life insurance, furniture, and personal possessions, including your online accounts. Since we can't successfully predict how long we will live, and illness and accidents happen to people of all ages, creating an estate plan is the best way to ensure your loved ones are cared for and protected.

## WHY DO I NEED A PLAN?

Having a well-defined and well-maintained estate plan protects the people you care about in the event something should happen to you. If you die or become incapacitated tomorrow, have you planned out who would care for your loved ones or inherit your assets? Your house? Pets? Online accounts?

## GEVURTZ MENASHE WILL SHOW YOU HOW TO EASILY AND EFFECTIVELY PLAN AND MANAGE YOUR ESTATE IN THREE PHASES.

### 1 PLANNING

The core of any estate plan involves a set of documents to appoint fiduciaries and provide direction for the distribution of your assets. Typically these documents include:

WILLS · REVOCABLE TRUSTS · POWERS OF ATTORNEY  
HEALTH CARE DIRECTIVES

In addition, our Estate Planning attorneys can help with the following:

ESTATE AND GIFT TAX PLANNING · LIFE INSURANCE  
PLANNING · CHARITABLE GIFT PLANNING · CHANGES TO AN  
ESTATE PLAN AFTER A SIGNIFICANT LIFE EVENT

### 2 MAINTENANCE

Estate plans evolve over time as family and financial situations shift. Plans also require review due to changes in life circumstances, taxes, and other laws. We can help review your estate plan and consider whether changes are necessary.

### 3 ADMINISTRATION

Having a well maintained and updated estate plan is one of the most valuable things you can leave your loved ones. By establishing long-term relationships with our clients, we are able to ensure their goals and objectives are carried out through each stage of life. In addition to planning, we can also assist in the following:

PROBATE · TRUST ADMINISTRATION · BENE-  
FICIARY REPRESENTATION · GUARDIANSHIPS &  
CONSERVATORSHIPS



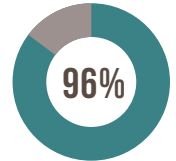
**ONLY 4 IN EVERY 10 AMERICANS REPORT HAVING A WILL OR LIVING WILL OR MEDICAL DIRECTIVE**

## A GOOD PLAN CAN:

Specify your healthcare preferences • Appoint someone to handle your affairs should you be unable to do so • Determine how your assets will be distributed should something happen to you • Appoint a guardian for your children or pets • Maintain privacy over your financial affairs • Minimize estate taxes • Give you peace of mind that your goals will be met

## PROTECT YOUR FUTURE

Estate planning education is important, both for you and for the future of your loved ones. A staggering 96% of Americans are not familiar with the consequences of not having a will.



## FOUNDED ON FAMILIES

Gevurtz Menashe is dedicated to family law and estate planning in Oregon, Washington and Idaho. For 40 years, we have built a practice around the core belief that quality care for our clients produces the best outcome when paired with our expertise in the law. We pride ourselves in a reputation for attentive representation of families coping with crisis or preparing for change. The human family is full of complexity, and we're here to help guide you through it.

*Gevurtz Menashe*

SINCE 1982

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FAMILY LAW & ESTATE PLANNING