Estate and Legacy Planning (Webinar Recording)

Whether you're in the early stages of your estate planning goals or looking to fine-tune an existing plan, this webinar offers actionable insights to help you craft a successful estate planning strategy. Explore the key elements of estate planning and learn how to protect what you've built for future generations.

Topics covered include:

- determining what's in your estate and its potential value;
- understanding how probate works and strategies to avoid it where possible;
- identifying who you want to impact and when to distribute your assets; and
- creating a customized estate planning strategy to meet your personal and financial goals.

Additional CAPTRUST Resources

CAPTRUST Estate and Legacy Planning Webinar Presentation (downloadable PDF)

The 25 Documents You Need (downloadable PDF)

10 Tips for Estate Planning (video)

Valuation Discounts for Gift and Estate Tax Savings (article)

An Introduction to Estate Planning (article)

For a copy of the transcript, click here.

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