



Estate and Legacy Planning (Webinar Recording)

Whether you're in the early stages of building your estate or are looking to fine-tune an existing plan, this webinar offers actionable insights to help you craft a customized 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 plan 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](#).