

80/20 Estate Planning
Host – Albert E. Gibbons

Tape # 3

Guests:

Kevin Danyi, JD, CLU – Danyi, Thompson, & Barrett, P.C.
Suzanne Hecht, Esq. – Haney & Hecht

Topic:
Wills

Outline:

What is a will, and what is its purpose?

Which assets are governed by a will?

Who should handle the beneficiary designations on clients' assets?

Who should have a will?

Who should draft the will?

What is intestacy?

What are some stumbling blocks to preparing a will?

What is a guardian?

What is an executor?

What is a trustee?

How should these individuals be selected?

How does an advisor get his client through the process of drafting a will?