



# Estate Planning at a Glance

## What Is Estate Planning?

A **process** by which an individual or family arranges the transfer of assets in anticipation of death. Estate plans aim to preserve maximum amount of wealth possible for the intended beneficiaries and flexibility for the individual prior to death.

## Our Process

1. Review current estate plan and suggest changes as required
2. Eliminate problems and costs associated with probate
3. Strategize for tax-efficient transfer of wealth
4. Evaluate and recommend estate planning options
5. Referral to our preferred estate attorneys

## Why Is It Important?

- Without proper estate planning, an individual or family could incur large federal and state estate taxes.
- If an estate goes to probate, the process can delay the distribution of assets and there is a risk that the assets will not go to the intended parties.
- Federal estate tax exemption—sunset provisions 12/31/2025.
- State estate tax exemptions.

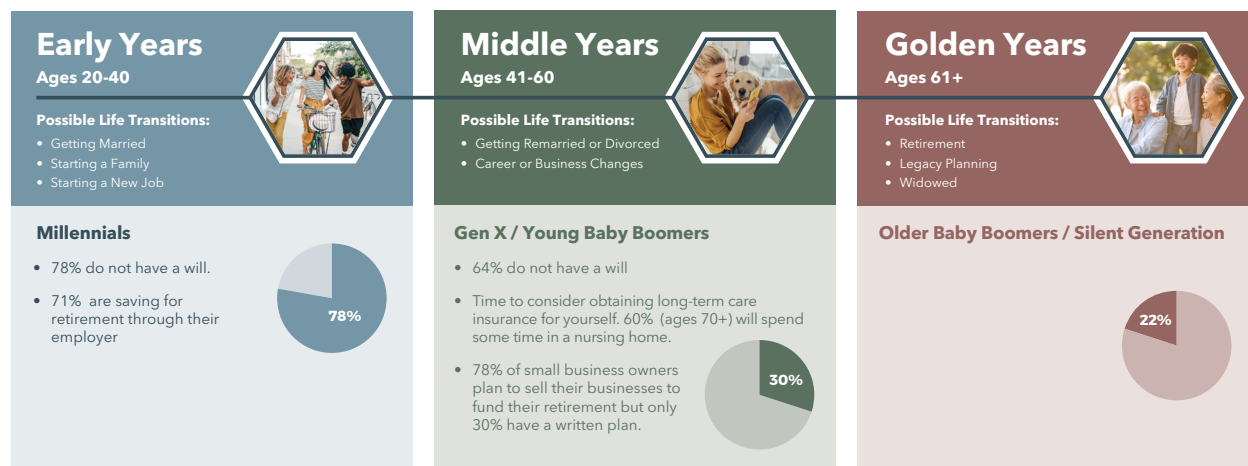
## How We Can Help

Our advisors will work with you to create a trust & estate plan that includes succession planning and asset protection. We'll discuss power of attorney, living trusts, wills, guardianship, and probate (what probate is, and how and why you may want to avoid it). We'll develop a tax-efficient succession plan for your children and grandchildren that incorporates your values and legacy wishes. In addition, we will evaluate trusts to make sure your assets are protected.

## Benefits

When you're ready to pass on your wealth, we'll provide assistance on reducing estate and gift taxes, strategically managing your assets, and making distributions to your heirs - efficiently minimizing expenses, delays or probate.

For more information go to, [bakerave.com/wealth](https://bakerave.com/wealth)



## Common Strategies

- Charitable Remainder Trusts (CRTs)
- Bypass trusts
- Donor-Advised Funds (DAFs)

## For Premier Clients

BakerAvenue will cover the cost associated estate planning document creation.

## Get Organized

Organizing your wishes with your estate plan. Questions to ask:

- Has anything changed in your life?
- Have any laws changed?
- What should your estate plan do?
  - Durable Power of Attorney for Healthcare
  - Durable Power of Attorney for Financial Decisions
  - Will / Trust
  - Trustees
  - Property

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