KARE Legacy | FAMILY & ASSET PROTECTION

Eight things an estate plan is built to prevent

A will, a trust and powers of attorney are not paperwork. They are instructions, so that a court, a statute or a disagreement never ends up deciding for what you built.



What People Are Actually Trying to Prevent

01 / 08

01
Probate
Months in court, fees taken off the top, and a filing that becomes public record, all before a single heir receives anything.

02
The State Deciding Who Inherits What
With no valid will, Florida's intestacy statute decides who inherits and in what share. Your wishes never enter the room.

03
A Judge Naming the Guardian
With no guardian designated for minor children, the court chooses from whoever steps forward to ask, in the first weeks.

04
Frozen While You Are Still Here
Incapacity with no durable power of attorney means a guardianship hearing before anyone can pay the mortgage or sign for the business.

05
Family Turning on Family
Ambiguity is what siblings fight over. A contested estate drains the inheritance and ends relationships that outlived you.

06
Old Paperwork Overriding Your Will
Beneficiary designations on retirement accounts and old policies legally outrank your will. An ex-spouse named years ago still wins.

07
A Business With No One Authorized to Run It
No successor manager and no transfer restrictions, and the equity passes to heirs who never wanted to run it.

08
An Estate That Must Sell to Pay Its Tax
Estates above the federal exemption owe tax in cash, generally within nine months. Illiquid estates sell the asset to raise it.

So that you gain — Control ✓ | Privacy ✓ | Speed ✓ | Clarity ✓

KARE Legacy

Teaching people to protect what matters most

Start with a conversation, not paperwork

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