FIRST-STEP SEMINARS

BY ECKBERG LAMMERS

Our estate planning group helps individuals and families prepare for a secure future through education and proactive planning. We understand the importance of proper estate planning to protect assets, minimize taxes and ensure a smooth transfer of wealth.

We offer customized group learning sessions to help people take the first steps needed to make their own estate planning decisions. Our engaging presentations help explain estate planning complexities in an easy-to-understand, step-by-step manner, resulting in actionable strategies. Our goal is to help each person enjoy peace of mind today and minimize stress and expense tomorrow.

Contact our Estate Planning group to discuss how we can help your organization.

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Presentations We Offer

Estate Planning 101
An introductory understanding of the essential estate planning topics. We will discuss Estate Planning, Wills, Trusts, and Probate, and include a Q&A portion to answer any additional questions.

Trusts v. Wills – Which One is Right for You?
This training explains the concepts of Trusts and Wills in depth, discussing the similarities and differences, the language included in each, and their legal significances and consequences.

Why Estate Plans Fail
The presentation emphasizes the importance of updating one's estate plan in light of significant life changes such as moving or other major events.

Asset Protection in Estate Planning
When it comes to Estate Planning, asset protection is key. This includes protecting difficult beneficiaries, as well as planning for medical assistance.

Preparing for Incapacity: EP Planning and More
Planning for potential incapacity involves nominating agents in the relevant Estate Planning documents, establishing guardianship or conservatorship, and taking into account the roles of courts, banks, and other third-parties.

We offer a diverse range of Estate Planning presentations free of charge.

Depending on your organization's needs, they can be conducted in person or via Zoom.

Living Trusts: Myths v. Reality
Are you in need of a Living Trust? Before you decide, it is important to separate myths from reality. These legal instruments are often misunderstood.

Probate: Myths, Misconceptions, and Mistakes
Misunderstandings of the probate process often lead to unexpected outcomes. Attendees will be instructed on the topic and the fallacies that frequently accompany it.

Planning for Non-Nuclear Family
When creating a Will for a non-traditional family, one must take into account stepchildren, the offspring of ex-spouses, and the interests of both the current spouse and their children.

Estate Planning Checklist: Beyond the Documents
When planning your estate, it's important to go beyond just preparing the necessary documents. Ensure your beneficiary designations are up to date, store your documents safely, and be mindful of the digital elements such as electronically stored information accounts, passwords, and logins.

Case Studies: EP/Probate Nightmares
Discussion of real-life scenarios illustrating the complexities and significance of proper Estate Planning. Using thought-provoking examples, attendees will gain valuable insights into the intricacies of wills, trusts, and other estate planning tools, helping to empower them to make informed decisions for their own financial futures and those of their loved ones.

Estate/Tax Planning
Complex Estate Planning strategies for high-net-worth individuals facing estate taxes.