

Will & estate consultation

- If you haven't recently updated your Will, or if your personal or financial situation has recently changed, you may be interested in our complimentary Will & estate consultation service.
- Our Will & Estate Consultant will meet with you to identify any opportunities you have to structure your estate in an efficient and tax-effective manner.
- It will cover topics such as:
 - Updating your Will
 - Evaluating suitability of trust structures
 - Naming your executor
 - Conferring Powers of Attorney
 - Maximizing your family's legacy and charitable gifts
- Following your meeting, you will receive a report outlining various estate planning issues for you to explore in further detail with your own lawyer or accountant.