

# Complete Guide To Estate Planning

BY ERIC FLEMING LAW



THE LAW OFFICES OF  
ERIC C. FLEMING, P.A.



[WWW.SRQESQ.COM](http://WWW.SRQESQ.COM)



# Table of Contents



## 1 Why Estate Planning Matters

Estate planning is more than just writing a will—it's about protecting your assets, ensuring your loved ones are cared for, and minimizing legal and financial burdens. A well-structured estate plan helps safeguard your legacy, reduce taxes, and avoid probate delays, giving you and your family peace of mind.

## 2 What to Prepare Before You Meet With Eric

To make your estate planning consultation efficient and productive, it's important to gather key documents and financial records. This includes business and real estate assets, bank and investment accounts, legal directives, tax returns, and even digital assets. Being well-prepared ensures a smoother process in creating a comprehensive estate plan.

## 3 Common Goals of Estate Planning

Estate planning aims to protect your wealth, streamline asset distribution, and ensure your wishes are honored. Whether it's avoiding probate, minimizing estate taxes, securing your business, or providing for dependents, a solid estate plan helps you maintain control and leave a lasting impact on future generations.







# Why Estate Planning Matters

Estate planning is more than just a will—it's about protecting your legacy, securing your assets, and ensuring your wishes are carried out. Whether you are a business owner, property investor, or managing generational wealth, a well-structured estate plan can save your family millions in taxes and legal fees while providing peace of mind.

## What to Prepare Before You Meet With Eric

### 1. BUSINESS & REAL ESTATE ASSETS

-  Business Ownership Documents – LLCs, S-Corps, Partnerships
-  Property Deeds & Titles – Primary residence, rental properties, vacation homes
-  Commercial Real Estate Holdings – Office buildings, investments
-  Business Agreements – Buy-sell agreements, operating agreements





## 2. FAMILY & PERSONAL ASSETS

- 💰 Bank Accounts & Financial Statements – Checking, savings, credit unions
- 📊 Investment Accounts – Stocks, bonds, mutual funds, brokerage accounts
- 🎨 Valuable Personal Property – Jewelry, artwork, collectibles
- 🚗 Vehicles & Boats – Titles, loans, insurance policies
- 🏠 Retirement Accounts – IRAs, 401(k)s, annuities

## 4. TAXES & FINANCIAL RECORDS

- 📅 Recent Tax Returns – Past 2-3 years for estate tax planning
- 📄 Liabilities & Debts – Mortgages, loans, credit obligations
- 🔍 Life Insurance Policies – Beneficiary designations

## 3. EXISTING LEGAL DOCUMENTS

- 📝 Current Will & Trusts – If applicable, bring copies
- ⚖️ Power of Attorney – Financial and healthcare directives
- 📋 Advance Healthcare Directives – Living wills, DNR orders
- 📂 Pre-Existing Estate Plans – Any legal documents already in place

## 5. DIGITAL ASSETS & PASSWORDS

- 🔑 Online Banking & Investment Accounts – Secure access info
- 📱 Social Media & Digital Properties – Instructions for handling
- 💻 Cryptocurrency Wallets – Keys, exchanges, and holdings

# Common Goals of Estate Planning



✓ **Avoid Probate & Reduce Legal Delays** – Keep your estate out of court

✓ **Minimize Estate & Inheritance Taxes** – Protect wealth for your heirs

✓ **Provide for Dependents & Special Needs** – Ensure care for children & relatives

✓ **Protect Business & Real Estate Assets** – Secure smooth transitions


✓ **Ensure Healthcare & Financial Decisions** – Assign trusted decision-makers

✓ **Create a Legacy & Philanthropic Giving** – Donate to causes you care about

# Connect With Us Now!





 **ERIC FLEMING LAW – YOUR ESTATE PLANNING PARTNER**

 **Call Us:** 941.225.8877

 **Email:** [Eric@SRQesq.com](mailto:Eric@SRQesq.com)

 **Website:** [SRQesq.com](http://SRQesq.com)

 **Start planning today with Eric Fleming Law, your trusted partner in building a lasting foundation for generations to come. **