

ASTERITA & ASSOCIATES, LLC

–Attorneys At Law–

Welcome to the latest edition of our newsletter!
We offer this newsletter as a trusted resource to keep you updated on important legal topics, news about our firm and upcoming events.

Revocable Trusts: A Smart Way to Add Privacy, Flexibility, and Peace of Mind to Your Estate Plan

When people hear the words “estate planning,” they often think of a [will](#). While a will is an important part of many estate plans, it is not always the only tool to consider.

For many individuals and families, a revocable trust can offer added benefits that help make things easier during life, and less burdensome for loved ones after death.

What is a revocable trust?

A [revocable trust](#) – sometimes called a living trust – is created during your lifetime and can generally be changed, updated, or even revoked as your needs and wishes evolve. That flexibility makes it an attractive option for people who want an estate plan that can adapt as life changes.

A revocable trust is also often considered a self-operating document. In other words, when the time comes, a successor trustee can typically step in and begin carrying out the trust’s terms without first having to obtain the type of court approval that is generally required to admit a will; to probate and appoint an executor to handle your affairs after you pass away. Skipping that process can help create a smoother, more efficient transition for your family during an already difficult time.

What are some benefits of revocable trusts?

One of the most important advantages of a revocable trust is that it can help certain assets pass outside of probate, provided those assets are properly transferred into the trust. That matters, because a will generally must be submitted to the probate court before its terms can be carried out. [Probate](#) is a court proceeding, which means it can involve delays, significant costs and expenses, and public disclosure.

By contrast, a revocable trust can help keep your affairs private. Unlike a probated will, which becomes part of a public court file, a revocable trust generally allows the



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administration and distribution of trust assets to take place privately. For many families, that is an important benefit.

In addition to helping avoid probate and preserve privacy, a revocable trust can provide a more organized framework for managing assets and carrying out your wishes. It may also offer peace of mind during your life by allowing for easier management of trust assets if circumstances change.

When should I do this?

Of course, a revocable trust is usually most effective when it is part of a broader, well-designed estate plan. Depending on your situation, that may also include a will, [powers of attorney](#), health care directives, and other important planning documents. Every person and family is different – estate planning should be tailored accordingly.

The right plan is not just about what happens after you pass away. It is also about making things easier for the people you care about, protecting your privacy, and putting a structure in place that reflects your wishes.

If you are interested in learning more about revocable trusts or incorporating trust planning into your estate plan, [contact us for a free consultation](#). We would be pleased to help you evaluate your options and create an estate plan tailored to your needs.

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