

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.

Treat Your Loved Ones The Right Way Now – Don't Trick Them Later

It might be spooky season but estate planning doesn't have to be so scary – both while you're planning and for your loved ones dealing with the aftermath.

An estate plan that tries to control your loved ones' lives rather than facilitate them can become a nightmare fast, with overly restrictive terms creating the very issues you hoped to avoid. With our trusted team, we'll steer you in the right direction – ensuring you cover all your bases now, rather than having your loved ones deal with the repercussions later.

Don't Be **Spooked**
When It Comes To
Estate Planning



Common Unintended Consequences

- Perceived favoritism: Basing inheritances to a child's current income or who you feel "needs" more of an inheritance. Children often equate unequal gifts with unequal love, only fueling resentment and long-term rifts.
- Life changes you didn't foresee: Marriages, divorces, job losses, health issues – rigid rules can misfire when circumstances shift.
- Administrative headaches: Complex conditions invite disputes, delays, and higher costs for trustees and beneficiaries.

When Guardrails are Appropriate

There are good reasons to include structure – especially when dealing with minors, beneficiaries with disabilities who receive public benefits, or individuals who truly need spendthrift protections. For these cases, targeted tools (e.g., testamentary trusts, supplemental needs trusts or staggered distributions) can protect without punishing.

Choosing Flexibility Over Fear

Instead of intricate “if/then” clauses, consider:

- Clear goals and trustee discretion: State your intent (education, health, stability) and empower a trusted fiduciary to adapt.
- Periodic review triggers: Allow updates after major life events or at set intervals.
- Simple, fair frameworks: Equal shares with thoughtful exceptions (and an explanation letter) often preserve family harmony better than detailed micromanagement.

At the end of the day, not having a thorough estate plan can quickly turn your loving legacy into a haunted house of conflict. Give your plan enough flexibility to handle the unknown and enough clarity to keep the peace.

Ready to de-spook your documents?

Whether you already have an estate plan or looking to build one, we'll review your wishes together and tailor protections where they're truly needed – [contact us today us today](#) to schedule a free consultation!

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