



Avoid the “Hail Mary” Moment – Plan Now

(Estate Planning and Business Succession)

Ramzi Hynek

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Rembolt | Ludtke LLP

Periodic Review of Your Estate Plan

- Will, Trust, Power of Attorney Documents
- Title/Beneficiary Designation to Assets
- Fund Your Revocable Trust
- Laundry List



Power of Attorney Documents



- HIPAA
- Adult Children



Current Gifts of Business Ownership Interest



- Discount for Minority Interest and Marketability
- Aid in Transition to Next Generation





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