## First Step of your Family Business Crisis Plan...



# **Estate Planning Consult**

An efficient review to assure short-term protection for your family & business!

HAMBURG, RUBIN, MULLIN, MAXWELL & LUPIN ATTORNEYS AT LAW

When a family business owner dies without a well thought out estate plan, assets could be disposed in an improper manner, and that person's estate will likely be subject to excessive death taxes. This result can have a devastating effect on your family.

Protect your family by conducting the Estate Planning Consult. Our consult is an efficient method of identifying and correcting significant problems, which might later create difficulties for your family.





Jon Samel

Kevin McGrath

Law Firm of Hamburg, Rubin, Mullin, Maxwell & Lupin (215) 661-0400

HRMM&L will lead you through the Estate Planning Consult to assure immediate short-term protection for your family and business in the event of a catastrophe.

### Call Today to Schedule Your Complimentary Estate Planning Consult, a Benefit Included in Your DVFBC Membership Package

#### **Identify the Problems**

What would happen in the event of an unforeseen death/ disability?

- How much will my family pay in estate taxes?
- What assets will be used to pay the estate taxes?
- How will my estate be divided?
- Will this distribution be fair?
- What will be the amount and sources of income for my surviving spouse?

#### The Benefits

Insightful written and verbal report:

- A clear understanding of your existing estate plan
- Quickly points out major problems that should be addressed immediately

#### **The Process**

Please bring the following with you to the initial meeting:

- The most recent asset inventory
- A copy of current will, trust and buy-sell agreement (if applicable)
- A copy of your most recent business financial statement