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retirement and estate planning Copy

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differences to consider between retirement and estate

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retirement planning and estate planning are distinct financial strategies designed to address different aspects of your financial wellness specifically retirement planning is the process of setting financial goals and creating a strategy to ensure a comfortable and secure retirement

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however a retirement trust is a strategy that could protect your estate for your beneficiaries and

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estate planning is the process of creating a strategy for the legal transfer of your assets to your heirs after your passing to ensure everything goes according to your wishes the plan should be based around a will and might also include family trusts life insurance powers of attorney and business succession plans

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when most people think about financial planning they think about money that makes sense but if you overlook the crucial cornerstone of estate planning you may create a disaster for your family and for your legacy we know you don't want that so we're hitting it hard in this episode of the retirement income show with dave stearns

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what is it about estate planning is about how you want your estate the money and savings you worked hard for distributed after your death it is about making sure that the people and causes you care about receive what you want to give them it helps you to work out what is your current worth in assets who gets what after you pass on

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estate trust income are taxable for details on estate trust income please refer to being a beneficiary of estate income being a beneficiary of trust income taxability of estate trust income received from an estate under administration or a trust

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