
FUNDERBURG LAW, LLC

ESTATE PLANNING TOOLS



NONPROBATE ASSETS

- Joint Tenancy
- Life Insurance Policy
- Payable on Death Accounts
- Trusts
- Deferred Compensation Contracts
- Totten Trusts

ESTATE PLANNING DOCUMENTS

- Will
- Trust
- Durable Power of Attorney for Finances
- Healthcare Proxy
- Living Will

ADDITIONAL TOOLS

- Retirement Accounts
- Charitable Donations

TAX CONSIDERATIONS

- Federal Estate Tax
- Gift Tax
- State Estate Tax