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# Meet the Estate Planning Team

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Estate planning is a complex field that covers many areas including wills, trusts, insurance, accounting, business continuation, and estate, gift and income taxes. It would be difficult to find one person who is a trained and licensed expert in all of these areas. Most often, the needed skills and knowledge are available only by bringing together an Estate Planning Team. The various members of the team can then work closely to preserve the estate and pass it on to the heirs with the least amount of expense and aggravation.



## You Are the Captain of Your Team

Possible team members may include the following:

- Attorney.
- Tax Professional.
- Insurance Professional.
- Trust Administrator.
- Charitable Advisor.
- Financial Advisor.