

Moving beyond a will –
providing security and peace of
mind when it is needed most



Ask an Expert

Sheri MacMillan, Senior Trust & Estate Practitioner,
President of MacMillan Estate Planning Corp.
and Host of The Strongroom on AM 770 & AM 1140

Q I am a successful business owner and a father of three teenage children. My wife and I have a will but, as our family grows and our asset base increases, we're wondering if it is time to create an estate plan to protect our finances, and our family?

A As a father and business owner, I am sure protecting the people you love and the company you built is of the utmost importance. An estate plan is very effective tool and the best way to preserve the life you have so carefully built for you and your family.

Your will is merely a wealth transference tool – it provides no tax planning benefits and can be easily contested after your passing. By properly applying recent estate planning techniques, you can secure the future of your family and business for years to come. When completed, your estate plan should incorporate a variety of components such as a will, power of attorney, personal directive and trusts, as well as thorough plans for your retirement, taxes and business succession. Keep in mind, for an estate plan to be effective it must be tailored to fit your lifestyle and long-term objectives, offering you both peace of mind and financial security.

A properly planned estate is the surest way to prepare both your family and business for the future. Remember, you've created a fulfilling life and preserving it commands every bit of the attention to detail you needed to reach the successful position you enjoy today.

MacMillan Estate Planning Corp. will be hosting a complimentary
Wine and Cheese Seminar on Tuesday, March 2ND, 2010 at 7:00 PM

TO REGISTER, PLEASE VISIT MACMILLANESTATE.COM

OR CALL (403) 266-6464.



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