

INSIGHTS + NEWS

Eileen Lee Breger Presented “Estate Planning 101: Breaking Down the Basics” for the MetroWest Chamber of Commerce (Webinar)

Does the thought of creating your estate plan seem overwhelming? What are the necessary documents? How do you select a person to administer your estate? How do you protect assets for your beneficiaries? Eileen Lee Breger answered these questions and more at the MetroWest Chamber of Commerce webinar “Estate Planning 101: Breaking Down the Basics” on September 8.

During the presentation, Eileen taught the fundamentals of estate planning, including:

- Understanding the components of a basic estate plan – a will, revocable trust, durable power of attorney, and health care documents
- Demystifying estate planning concepts – “probate,” “gift and estate tax,” and “trustee”
- Gaining knowledge about estate tax planning and funding an estate plan