

INSIGHTS + NEWS

Eileen Lee Breger Presented “Estate Planning 101: Breaking Down the Basics” at Senate President Karen Spilka’s Health and Wellness Fair

Eileen Lee Breger presented two sessions of “Estate Planning 101: Breaking Down the Basics” on October 14 at Senate President Spilka’s 55+ Fair: Health and Wellness for Active Agers and Those Who Love Them. At the event, Eileen discussed the necessary estate planning documents, how to select a person to administer your estate, and how to protect assets for your beneficiaries. She also explained 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