



IPB Tax, Trusts & Estates Newsletter

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Estate Planning

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In This Issue:

- **Tips to Avoid Probate** - Creating jointly titled property and proper beneficiary designations, transferring property to a LP, LLC, or revocable trust, and planning for non-domiciliary assets may avoid the expense, hassle and intrusions of probate.
- **Planning When Death Seems Imminent** - Empowering trustees and agents to make family gifts and charitable donations when a client becomes disabled, notifying account advisors of deathbed intentions, and understanding required timeframes for action may allow estate planning literally up to someone's last days.
- **Not All Probate is Created Equal** - State law options such as Statement in Lieu, Modified Administration, and Small Estate Administration offer alternatives to traditional estate administration.
- **Simplifying Estate Valuation** - Careful attention to appraisal requirements helps to avoid audits and penalties, and appropriate use of alternate valuation may save federal estate taxes.
- **IPB in the News**