

ESTATE PLANNING INSIGHTS

PROTECTING YOU AND YOUR LOVED ONES



Welcome to the April edition of our Estate Planning Insights! This month, we're highlighting the importance of clarity and preparation. From exploring why young adults need a health care proxy to uncovering what happens to frequent flyer miles in your estate, we're dedicated to helping you navigate life's complexities with ease. Let's ensure your future plans remain refreshingly uncomplicated.

LUNCH & LEARN SPONSORSHIP OPPORTUNITY

We're looking for companies and organizations interested in hosting a Lunch & Learn session focused on estate planning essentials. It's a fantastic way to offer value to your employees or members, empowering them with vital knowledge to protect their families and assets. If you know an organization that could benefit, please connect us—we'd love your referral!



AVOID THIS COMMON ESTATE PLANNING MISTAKE WITHOUT NEEDING \$80M

Protect your estate from unexpected outcomes. Learn from Gene Hackman's story why a simultaneous death clause matters.

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HOW TO PROTECT INHERITANCE WITH ESTATE PLANNING TRUSTS

Discover how two families handled inheritances differently—one thrived with estate planning trusts; the other faced financial ruin.

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WHY YOUNG ADULTS NEED A HEALTH CARE PROXY

Accidents happen to anyone. Learn why every young adult needs a health care proxy to ensure medical decisions match their wishes.

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WHAT HAPPENS TO FREQUENT FLYER MILES WHEN YOU DIE?

Don't let your frequent flyer miles vanish! Learn how to include rewards points in your estate plan and pass benefits to loved ones.

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A LETTER FROM JEFF – APRIL EDITION

Dear Friends,

Spring is here, and it's always a great reminder of renewal and growth. At our firm, we're continually striving to simplify estate planning so it feels approachable rather than overwhelming. Thank you for your continued support and trust. Your referrals mean a great deal and enable us to keep spreading clarity and confidence. If there's anything we can do to support you or someone you know, please don't hesitate to reach out. Here's to a wonderful spring season!

Warmly,

Jeffrey S. Berenholz, Esq.



[Click here to download your FREE GUIDE – the Top 10 Estate Planning Tips for Parents](#)

Disclaimer: This content is for informational purposes and does not establish an attorney-client relationship. Please contact us directly for personalized advice.