

ESTATE PLANNING INSIGHTS

PROTECTING YOU AND YOUR LOVED ONES

Protect Your Child's Future with Smart Estate Planning

Life is unpredictable, but your child's security doesn't have to be. Join our free live webinar on **March 27 at 1:00 PM EST** to learn essential estate planning strategies for parents. Discover how to name guardians, safeguard your assets, and create a plan that honors your wishes—all in a simple, stress-free way. Secure their future with confidence. Reserve your spot today!

**SPOTS ARE LIMITED -
RESERVE YOURS TODAY!**



**March 27
1:00 PM EST**

**CLICK HERE TO SIGN UP -
LIMITED SPACE IS AVAILABLE**





SPRING CLEANING: DOES YOUR ESTATE PLAN NEED A REFRESH?

Spring is the perfect time to tidy up more than just your home. When was the last time you updated your estate plan? From reviewing beneficiaries to updating legal documents, make sure your plan reflects your current wishes. [**\[Read More →\]**](#)

3 ESTATE PLANNING LESSONS FROM INFLUENTIAL WOMEN

What can we learn from Madam C.J. Walker, Eleanor Roosevelt, and Oprah about estate planning? These remarkable women left behind lasting legacies, and you can too. Explore estate planning strategies inspired by powerful women in history. [**\[Read More →\]**](#)



THE HIDDEN TAX TRAPS IN YOUR ESTATE PLAN – AND HOW TO AVOID THEM

Think your estate plan is tax-efficient? Many don't realize how hidden tax traps—like capital gains, IRA missteps, and unplanned gift taxes—can eat away at their legacy. Discover smart strategies to minimize taxes and maximize what you leave behind.

[**\[Read More →\]**](#)



POOR ESTATE PLANNING MISTAKES THAT COULD COST YOUR FAMILY THEIR INHERITANCE

A lack of estate planning cost one young adult nearly everything her parents worked for. Don't let the same mistakes happen to your family. Learn how trusts, structured inheritances, and proper planning can safeguard your legacy and protect your loved ones. [[Read More →](#)]



A LETTER FROM JEFF – MARCH EDITION

Dear Friends,

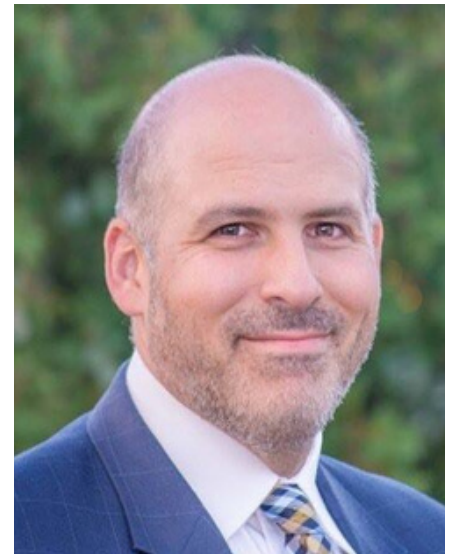
March is a time to reflect on legacy—both what we build and what we leave behind. In honor of Women's History Month, we're sharing estate planning lessons from influential women like Madam C.J. Walker and Eleanor Roosevelt, proving that planning isn't just about wealth—it's about impact.

Spring is also the perfect time to refresh your estate plan. Have your assets changed? Has your family grown? A quick review ensures everything reflects your current wishes.

If you haven't started planning yet, now is the time. Our Peace of Mind Planning Session gives you a clear, stress-free path forward. Reach out—I'm happy to help.

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.