



Providing Peace of Mind by Solving Problems with Integrity & Compassion in the following areas:

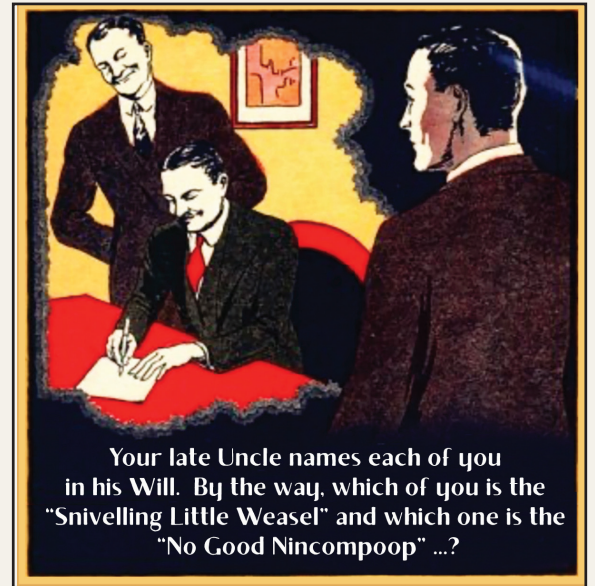
ESTATE & BUSINESS PLANNING • FAMILY LAW • REAL ESTATE

IT'S THE LAW!

Think only famous people leave behind millions of dollars and no Will?

An unassuming 87-year-old man living in a small bungalow in a quiet suburb of Chicago died recently, leaving the largest amount of unclaimed money in U.S. History - \$11 Million. He left no Will or Trust. He had no spouse or children and his six siblings had all passed away before him.

A law firm spent years – and many *many* hours – researching records and building a family tree of possible heirs. They ended up with a 15-foot-long scroll stretching the span of a conference room which detailed the 119 total family members - five generations worth (think second cousins twice removed) - residing all over the world. It is estimated that it will take another 1 to 4 years to distribute all of the funds to all of the beneficiaries. After attorneys' fees and taxes, each heir will receive a check for around \$60,000.



If you were that 87-year-old and knew that would be the outcome, do you think you'd be happy? Would you be satisfied to see a fortune you'd amassed through frugal living and investing be sent to 119 strangers across the globe? Or do you think you'd rather have a say in how and to whom your *life savings* is distributed, and what they could do with it? While you may not have \$11 Million squirreled away, whatever you have at the time you die represents your life savings. It would be shocking if you DID NOT want to be the one to direct where it went once you didn't need it anymore.

When you die *"intestate"* (without a Will or Trust), you are relying upon the Court to distribute your assets to a predetermined list of relatives – and sometimes distant relatives, via the *Intestacy* statute. And, while the above example of having 119 beneficiaries is extreme, we deal with many clients who are surprised and disappointed that their Mom's money is going to a sibling with a drug problem or on the verge of divorce, or that Dad's money is going to be split with a sibling who hadn't seen or spoken to Dad in many years. Maybe, whatever the family dynamic, you wouldn't be happy about having to Probate Mom/Dad's estate simply because she/he didn't spend a little time and money to put everything in order.

Chances are, if you pass without a Will or Trust, it won't be newsworthy enough to make it into the papers. But that won't make the family you left behind feel any better about it. Plan today. For yourself. For your family. For a future we will all, one day, experience – the one where others are left to unravel a mess or to thank you for doing some advance planning that protected them from unintended consequences.

Do your New Year Resolutions include reviewing your Estate Planning documents?



Work out more, eat better, spend less time on social media. We all have some common New Year's resolutions. But what about finally getting to that Will/Trust? Or, if you already have a Will/Trust, does it still

designate the right beneficiaries and the right people to carry out your wishes? Do you even know where it is? The start of a new year is a great time to reflect and review what you need to do **now** to put your ducks in a row for later. Add it to the list and call us to help you check it off!

Our Office



Providing Peace of Mind by Solving Problems with Integrity & Compassion

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Wills & Trusts • Powers of Attorney • Health Care Surrogates • Living Wills • Probate Estates • Succession Planning • Contracts & Purchase/Sale Agreements

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REAL ESTATE

Community Association Law • Residential & Commercial Transactions • Deeds • Closings



Attorney Adam S. Gumson of JUPITER LAW CENTER graduated from *Duke University (1988)* and the *University of Florida College of Law (1991 with Honors)*. In addition to preparing and reviewing Contracts, he primarily handles matters involving *Estate and Business Planning (including Wills, Trusts, Durable Powers of Attorney, Health Care Surrogates, Living Wills, Succession Planning, Contracts & Purchase/Sale Agreements)*, *Probate Estates, Family Law (Divorce, Custody, Alimony, Timesharing, Same-Sex relationships, Pre/Postnuptial Agreements, Modification actions and Collaborative Law)* and *Real Estate (Community Association, Residential/ Commercial Transactions, Deeds, Closings)*. He is married and resides in Jupiter with his wife and three children.

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