

Planning Your Estate

Harris-Pero Law Firm, PLLC will evaluate your personal circumstances before creating a plan. This includes the potential consequences involving distribution of each of your assets to your planned beneficiaries.

With your permission, HP Law may communicate with your financial advisor or tax professional to help you consider financial planning and tax consequences for your assets to ensure your goals are met.



Additional Planning Options

We offer planning for:

- Out of state real estate
- Care of special needs loved ones (Supplemental Needs Trust)
- Care of elderly loved ones
- Care of loved ones with addiction or financial challenges
- Second marriages & unmarried partners
- Business succession
- Estate tax reduction
- Preservation of shared family property (Camp LLC or Camp Trust)

Why Choose Us

Our team takes a holistic approach to estate planning. We get to know you and provide a personalized plan, tailored to your individual needs.



Serving clients in Saratoga Springs, the North Country, and throughout New York, virtually and in-person.



OFFICE LOCATION

538 Maple Avenue
Saratoga Springs, NY 12866
We can also come to you.



Section Member
Estates & Trusts
Elder Law & Special Needs



ESTATE PLANNING



Helping families, business owners, and farmers plan for the future and navigate life's transitions.



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Attorney Advertising

Reasons To Plan

Estate Planning is not just about planning for the end of life. Planning in advance is important for many life events and can allow you to:

- Be ready for unexpected life emergencies & absences
- Protect your hard-earned money
- Prepare for future retirement & long term care
- Make your health care wishes known
- Prevent family disputes
- Guard against unwise spending by beneficiaries
- Choose a guardian for your minor children

Why Work With An Estate Planning Attorney?

- Estate planning is unique to your individual needs and goals.
- Self-executed documents are not always valid.
- Planning should balance your goals with a plan that works with the law.
- Your attorney can draft documents to work together as an integrated plan.
- Your attorney can recommend options best-suited to your individual needs.

Planning for Life Needs

A **Health Care Proxy** allows you to appoint a trusted individual to make health care decisions for you if you are unable to make such decisions for yourself.

A **Living Will** describes your wishes regarding prolonging your life or withholding support if you become terminally ill. It also helps your loved ones and doctors make decisions more easily in the event of a serious health emergency.



A **Power of Attorney** gives the person you appoint the power to manage your financial and legal affairs during your lifetime. It is important to have this document in place in case of a life emergency. It can help prevent the need for a Court proceeding if you become incapacitated.

Planning for Your Legacy

A **Last Will & Testament** controls any property you own in your name alone, known as your Probate Estate, and allows you to appoint an Executor to settle your estate.

Putting a Will in place allows you to decide who should receive your assets. Without a Will, the laws in your state of residence determine who will receive your Probate Estate, and who will be in charge of administering it.

A **Living Trust** is a contract between you and a trustee which may be used to:

- Avoid Probate
- Avoid Guardianship
- Protect Assets
- Ensure Privacy

Planning for Minor Children

Standby Guardianship Designation for Minors

This allows you to name a standby guardian for your minor child in the event of an emergency or your death.

Your estate plan can include special powers and authority for a guardian that you name, providing you with some control over your child's future.