

If you're serious about protecting your assets, securing your family's future, and leaving a legacy that stands the test of time, then you'll want to read every word of this report.

PROTECT YOUR LEGACY

The Insider's Guide to
Choosing the Right Estate
Planning Attorney™



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The Insider's Guide to Choosing the Right Estate Planning Attorney™

The right estate planning attorney does more than fill out paperwork; they protect your life's work, secure your legacy, and give you peace of mind that your family and assets are well cared for. In this report, you'll discover:

- ✓ Critical estate planning errors that can devastate your family's future.
- ✓ How simple oversights by an inexperienced attorney can lead to strained family relations, hefty taxes, and probate costs that drain your estate's value.
- ✓ How a seasoned estate planner can customize a comprehensive plan for asset protection, tax savings, family dynamics, and business succession.
- ✓ How choosing the right estate planning attorney safeguards your lifestyle, legacy, and loved ones, ensuring your assets are distributed as you desire with minimal tax impact.

Dear Reader,

I'm Mike Bascom. Throughout my career, I've helped my clients create iron-clad Estate Plans that secure their lifestyle, their loved ones, and their legacy. I believe estate planning is about PEOPLE, not just documents, and I help my clients anticipate, plan, and solve problems in advance.

My goal is to empower you. I want to help you manage your affairs in a way that keeps you at the center and in control, no matter what the future may bring. If you become incapacitated, I want to make sure you're able to still take care of yourself and your loved ones. When you're gone, I want you to be able to leave your possessions and your wealth to whom you want, in the amount you want, and in a way that would defeat any challenge and with as little government interference as possible.

I wrote this report because I've heard one too many stories from clients who came to me when it was too late. Their loved one had passed with an inadequate or poorly crafted Estate Plan, and the family was left suffering, uncertain, in turmoil, and under the thumb of the Probate Courts. I've seen families torn apart because of this. Children handed over to unwilling relatives. Beloved family members cast aside due to improper consideration. Estates—that could have benefited the next generation—decimated by taxes and attorney fees.

Bottom line, I've seen too many good people suffer from inadequate estate planning.



Estate planning missteps can lead to significant financial loss, unnecessary taxes, and endless legal battles that could easily have been avoided. That's why it's so important to understand not just the common pitfalls but the profound impact that a seasoned estate planning attorney can have on preserving your family's wealth and happiness.

In my practice, I've witnessed the costly consequences of simple oversights—an inexperienced attorney missing a tax-saving opportunity or improperly drafted documents leading to probate nightmares. These are not just minor errors. They can deplete your estate's value, leaving your loved ones with less than you worked so hard to provide. This report shows why expert guidance is essential for creating strategies tailored to your unique needs.

A skilled estate planning attorney does more than draft documents; we create comprehensive plans covering asset protection, tax strategies, family dynamics, and business succession. We protect your lifestyle, legacy, and loved ones. This report will help you choose the right attorney who makes sure your assets are distributed as you wish, with minimal taxes, and safeguards your family's future. Thank you for trusting me to guide you through these crucial decisions. Let's protect what matters most together.

Common Estate Planning Pitfalls That Could Cost Your Family

Estate planning is more than just drafting a document; it's about securing your family's future and making sure your wishes are honored. However, simple oversights can have serious consequences. Consequences that impact your loved ones long after you're gone. Here's what you need to watch out for:

Not personalizing your Estate Plan. Your life is unique, and your Estate Plan should be too. Using a basic template or one-size-fits-all approach might seem easy, but it can lead to big problems later. If your Estate Plan doesn't reflect the specific needs of your family, your business, and your long-term goals, it could fail when it's needed most.

Think about it—if your Estate Plan isn't customized, it might miss crucial details that are important to you. This could result in unnecessary taxes, prolonged probate, or legal challenges that drain the value of what you've worked so hard to build. By not personalizing your Estate Plan, you risk leaving your family with a complicated and costly mess to sort out after you're gone.

Failing to keep your Estate Plan up to date. Life's big events, like the birth of a child, a divorce, or the death of a designated Executor, can interfere with the effectiveness of your Estate Plan. If you fail to change your beneficiary designation after a divorce, you could unintentionally leave your ex-spouse assets. Imagine the chaos if your Estate Plan hasn't been updated and your assets end up in the wrong hands simply because you didn't take the time to revise it. Or consider what could happen if your plan doesn't account for changes in tax laws—your family could be left with hefty taxes and unnecessary legal battles. By not keeping your Estate Plan up to date, you risk leaving your loved ones with unnecessary stress and financial burdens during an already difficult time.

Not choosing the right people to carry out your Estate Plan. One of the most important decisions in estate planning is selecting the right people to carry out your wishes. Your Executor, Trustee, and healthcare proxy all play vital roles in ensuring your plan is executed smoothly. However, choosing the wrong people for these roles can cause serious problems.

Imagine an Executor who is overwhelmed by the responsibilities or a Trustee who doesn't fully understand how to manage a Trust. Without the right knowledge, experience, or dedication, they might mismanage your assets, delay important decisions, or even make mistakes that could lead to costly legal disputes. Mismanagement can result in the loss of assets, increased taxes, and a failure to meet your wishes. Family disputes may arise if your loved ones feel that decisions are being mishandled, leading to strained relationships and potentially long-lasting rifts.





Not having a proper understanding of tax laws in your state. Without the proper plan, taxes can eat away at the inheritance you intend to leave behind. Laws vary widely, and not tailoring your plan to your state can result in hefty taxes or prolonged probate, causing your family unnecessary stress during their time of grief.

Not having a clear guardianship plan for minor children. If you pass away without specifying who should take care of your children, the courts will make this deeply personal decision for you, potentially choosing someone you might never have approved of.

Mistakenly believing a Will covers everything. In reality, a Will only addresses some of your assets after death. Likewise, it doesn't handle your wishes if you become incapacitated. To ensure complete protection, you need Powers of Attorney, Trusts, and Advance Directives to manage your finances and healthcare decisions when you can't.

Not coordinating asset ownership and beneficiary designation with your Estate Plan. If your assets are not titled correctly or if your beneficiary designations don't match your Estate Plan, your wishes may not be carried out as intended. This can lead to assets going to the wrong people or being tied up in probate, causing delays and extra costs for your loved ones.

It's important to ensure that everything works together—your Will, Trusts, and beneficiary designations need to be consistent. Without proper coordination, even the best Estate Plan can fall apart, leaving your family with unnecessary complications.

Not having a formal way to address updates in your Estate Plan. Without a formal process to review and update your plan regularly, it can quickly become outdated. If your plan isn't updated, your wishes might not be honored, and your family could face unnecessary legal challenges.

Having a formal way to review and update your Estate Plan ensures it stays current with your life's changes. Regularly scheduled check-ins with your estate planning attorney help catch any needed updates so your plan continues to protect your assets and your loved ones. You do not want to leave this to chance. Make sure there's a system in place to keep your Estate Plan up to date.

Fall victim to any one of these mistakes, and your estate is mishandled, your wishes are not carried out, and taxes and uncertainty unnecessarily burden your loved ones.

The High Cost of Inexperience and How Estate Planning Errors Can Drain Your Wealth

When you set out to safeguard your family's future through estate planning, the stakes couldn't be higher. Every decision you make—from the attorney you hire to the directives you set—affects not just your assets but the well-being of your loved ones after you're gone.



Trusting your life's work to an attorney who lacks the necessary experience can be a costly and damaging mistake. The reality is that inexperienced attorneys may have the best intentions, but they simply do not know what they do not know. An oversight, a missed detail, or a misinterpreted state law could lead to severe financial repercussions for your family. An inexperienced attorney may seem competent on the surface but might fail to ask critical questions, anticipate potential issues, or probe deeper into your unique situation. This isn't just about filling out forms—true estate planning requires listening, counseling, and foreseeing potential problems before they arise.

The wrong attorney might overlook essential tax-saving strategies or improperly draft a document, leaving your heirs mired in probate—a costly, public legal process that can drag on for months, even years. This depletes your estate's value through endless fees and taxes, and worse, it exposes your family's private matters to public scrutiny.

The consequences of inexperienced legal guidance don't stop with financial loss. Without the right plan in place, your wishes for your family's future might not be realized. Your assets could end up in the wrong hands or be tied up in legal battles between family members, leading to strained relationships and potential lifelong rifts. Think of the emotional toll on your loved ones—being forced to navigate complex legal situations while grieving. This will place a huge burden on them, one that is entirely avoidable.

Your life's legacy is on the line. The importance of choosing a skilled estate planning attorney cannot be overstated. An experienced attorney doesn't just draft documents; they listen, probe, counsel, and anticipate problems before they arise. They understand the intricacies of tax laws and Trust structures and align these elements with your specific needs and wishes. A seasoned estate planning attorney takes a comprehensive approach, ensuring every aspect of your Estate Plan is crafted to protect your assets and provide for your loved ones after you're gone.

Don't let preventable mistakes tarnish your legacy. Choose an attorney who does more than draft documents—choose someone who will plan your estate exactly as you envision, with minimal tax implications and no unnecessary legal entanglements. Your family's peace of mind—and your own—depends on the wisdom of your choices today.

The Power of Precision: How the Right Estate Planner Protects Your Future

When you work with a law office that focuses only on estate planning, you gain more than just legal documents; you gain a strategic partner dedicated to safeguarding your legacy. Someone who takes the time to understand your entire financial picture, from your investments and properties to your business interests and family dynamics. They ask the right questions to uncover potential issues that might not be obvious and then create a plan that addresses these complexities head-on.

One of the most significant advantages of having the right estate planner is their ability to implement asset protection strategies. Whether it's shielding your wealth from potential creditors, legal disputes, or even future divorces within the family, an experienced estate planning attorney knows the best tools and techniques to use. This could include setting up various types of Trusts, such as Revocable and Irrevocable Trusts, that provide privacy and a robust defense against claims that could erode your estate's value.

Tax efficiency is another area where an experienced estate planner shines. Taxes can take a substantial bite out of your estate if not properly managed. The right planner will leverage every available strategy to minimize your tax burden. This means more of your hard-earned wealth stays with your loved ones. These strategies can include taking advantage of gift tax exclusions, charitable giving options, and other tax-saving mechanisms often overlooked by less experienced attorneys.

Family dynamics can often complicate estate planning, but the right estate planner has the experience to handle these situations with tact and precision. Whether you have a blended family, children with different needs, or potential conflicts among heirs, the right attorney can craft solutions that keep the peace and fulfill your wishes. They set up clear guidelines and structures that prevent misunderstandings and disputes. This means your family remains united, and your legacy is preserved.

Finally, for business owners, succession planning is a critical component of an Estate Plan. The right estate planner will work with you to develop a detailed succession strategy that protects your business's continuity and value. Whether your goal is to pass the business on to the next generation, sell it to a third party, or implement a management transition, an experienced attorney will make sure the process is smooth, and your business remains a thriving asset for your estate.

In short, the right estate planner offers a comprehensive, customized approach covering every aspect of your estate. They provide peace of mind, knowing that every detail has been considered and that your family's future is secure. By choosing an experienced estate planning attorney, you're not just planning for what happens after you're gone; you're making sure your legacy continues to flourish for generations to come. With their expertise, you can confidently face the future, knowing that your estate is in capable hands.





Your Future, Your Choice: Protect Your Legacy with the Right Estate Planning Attorney

When it comes to protecting your lifestyle, legacy, and loved ones, you need an estate planning attorney you can trust. One who will ensure your assets are distributed according to your wishes, minimize tax liabilities, and provide peace of mind for you and your family. At Bascom Law, our staff and attorneys are 100% dedicated to understanding and skillfully handling all the nuances of estate planning.

When you work with us, we take the time to understand your unique situation and goals. We don't offer one-size-fits-all solutions but instead craft a personalized plan that reflects your specific needs. Whether you want to ensure your spouse is taken care of, provide for your children's education, or support a favorite charity, we will create a plan that aligns with your values and objectives.

One of the biggest advantages of working with our law firm is our ability to minimize tax ramifications. Estate taxes, gift taxes, and capital gains taxes can significantly reduce the value of your estate if not properly managed. We will utilize various strategies, such as Trusts, charitable giving, and other tax-efficient vehicles, to protect your wealth from excessive taxation. This means more of your assets are passed on to your beneficiaries rather than being consumed by taxes.

In addition to tax savings, we make sure your assets are distributed exactly when, to whom, and in the manner you choose. We help you set up Trusts, Wills, and other legal instruments

that specify your wishes in detail. This precision prevents misunderstandings and disputes among your heirs, ensuring your legacy is preserved according to your intentions. For example, you might want to distribute funds to your grandchildren for their education at specific ages or provide lifelong financial support to a family member with special needs. We make sure these wishes are clearly articulated and legally enforceable.

Moreover, we protect your loved ones from potential legal and financial pitfalls. We make sure guardianship for minor children is clearly established, Healthcare Directives and Powers of Attorney are in place for medical and financial decisions, and all aspects of your estate are managed smoothly in the event of your incapacity or death. This comprehensive approach means your family is taken care of and your lifestyle is maintained without unnecessary stress or hardship.

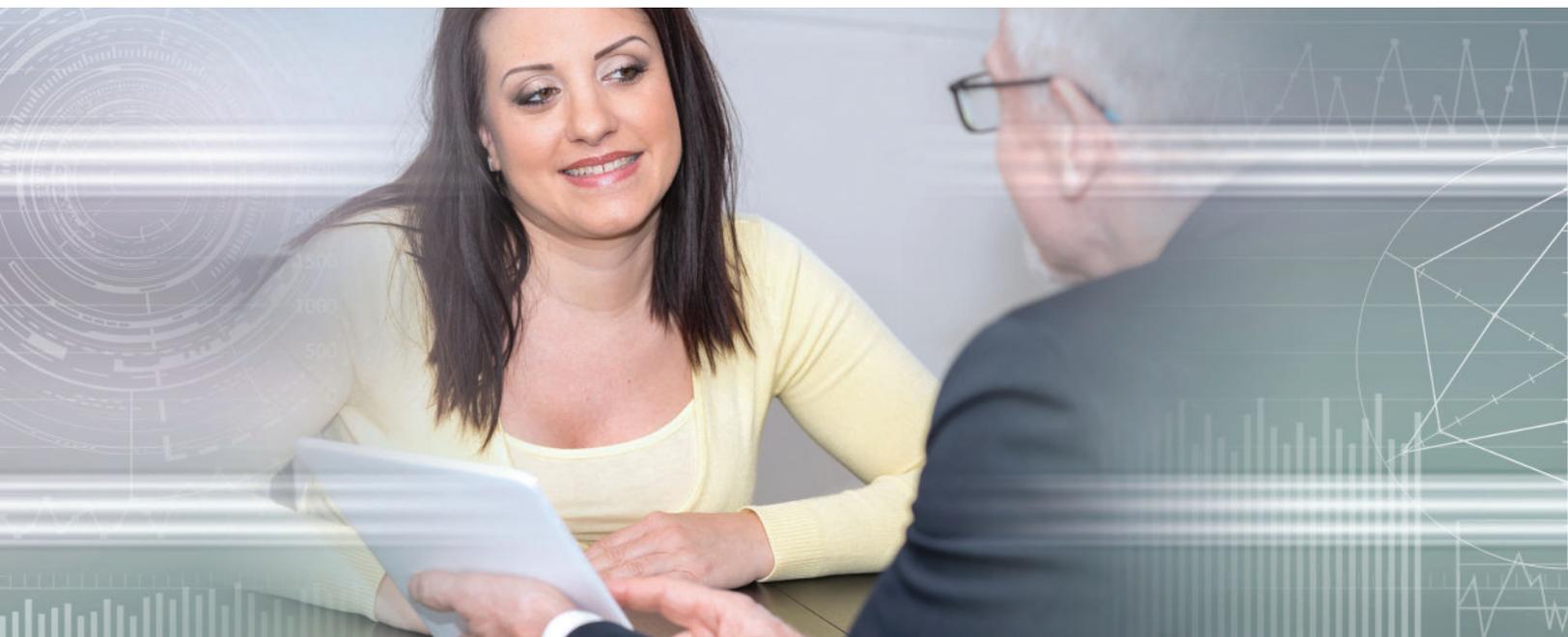
When you choose us, you're choosing a lifelong partner and a legal ally dedicated to ensuring your wishes are carried out exactly as you want. Each year, you'll have the opportunity to tell us if you've experienced any changes in your situation. Whether it's births, deaths, marriages, or changes in the law, this review will help you update your plan to keep it accurate and effective.

Imagine the comfort of having a team that knows you and your family personally. We tailor our advice to fit your unique needs so you get expert guidance that's right for you. No cookie-cutter solutions—just the right plan for your situation.

We also help train your helpers (the people you've chosen to carry out your wishes), ensuring they understand their roles and responsibilities.

With Bascom Law, you're not just protecting your assets—you're securing your family's future. We provide the expertise and personal touch that makes all the difference. Trust us to be your lifelong partner in estate planning so everything you've worked for is preserved and passed on just as you wish.

Make the smart choice. Protect your future with Bascom Law and enjoy the peace of mind that comes with a trusted legal partner by your side.



If you're ready to get started, your next step is simple:

Let's have a conversation. Please call (678) 679-5277 and schedule a consultation. We'll discuss your needs and the specifics of your situation and go from there.

Your family's future is too important to leave to chance. Take the first step towards securing your legacy and protecting your loved ones.

We are happy to help in every way we can and look forward to working with you soon!

Sincerely and Thanks,



Mike Bascom
Bascom Law, PC
Estate Planning & Elder Law



SEE WHAT OUR CLIENTS ARE SAYING ABOUT THEIR EXPERIENCES WITH US...

Google Reviews 5.0 ★★★★★

K Ken Steele



We had a great experience with the whole team at Bascom Law. Mike and Brad were very informative and patient in answering our many questions during the interview and signing process. They took the time to explain the process. Very organized. Very professional. Highly recommended.

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We used Bascom Law for our Trust and have been very impressed with the level of service and consultation provided. They answered all of our questions and have made us feel so much better about our plans for our children. I highly recommend Mike and Brad for your estate planning needs.

M Marsha Byrne



Mike Bascom and Brad were extremely helpful and knowledgeable in helping us to create a trust and will. I only wish we had come in sooner. We feel extremely confident in our estate plan and would recommend anyone thinking of estate planning, asset protection, and elder law.

 **Suzzz45 V**



After going through the loss of my parents and being directed/guided by my parents' trusts, I knew it was time to set up my own personal Trust for my daughters. Brad Bascom did an excellent job explaining everything in the notebook and how to make sure everything was included into the Trust.



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