

## FREQUENTLY ASKED QUESTIONS

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### 2. Family Communication

#### **Q1: How do I talk to my family about estate planning?**

*Start by explaining why it's important—it's about protecting everyone and making things easier. You can say, "I want to make sure everyone knows what to do and there's no confusion." Being honest and open is key.*

#### **Q2: Should I involve my kids in estate planning discussions?**

*Yes, if they're old enough to understand. It helps them know what to expect and gives them a chance to ask questions or share their thoughts. It's better to have these conversations early so everyone is on the same page.*

#### **Q3: What if my family disagrees about the plan?**

*It's normal for families to have different opinions. The important thing is to listen and explain your reasons. You can also work with a lawyer or mediator to help find a solution that everyone can accept.*

#### **Q4: If beneficiaries are well defined on various cash and investment accounts, do they act as a cushion without an estate plan or will? On the flip side, does an estate plan or will override designated beneficiaries?**

*If they are non-probate assets (such as life insurance, annuities, retirement accounts, etc.) that require a specific beneficiary designation, then it is the beneficiary designation on the asset that will control, not your will/trust. Beneficiary designations on non-probate assets are one element of estate planning.*

#### **Q5: If one spouse passes away and the surviving spouse gets remarried to someone with children from a previous marriage, can the surviving spouse change the estate plan to include stepchildren?**

*It depends on how the Estate Plan (EP) is structured. Typically, an EP/Will includes provisions for a 'class of beneficiaries.' Some state laws will automatically assume that the entire class of beneficiaries are included unless explicitly stated otherwise in the EP.*

#### **Q6: How do we address foreign assets and businesses in other countries to include in a single estate plan which is formed and registered in the US? How would other countries and their respective courts honor or address those? Is there any international body for this, or are they subject to court processes?**

*To include foreign assets and businesses in a single estate plan registered in the US, it's important to work with an attorney experienced in international estate planning. Different countries have different laws, and there isn't a single international body that governs all estate issues. Each country may require separate legal processes to recognize and enforce the terms of a US-based estate plan.*

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