

Protecting Special Assets In Your Estate

Wednesday, February 24, 2010

2:00 p.m. – 3:00 p.m.

Bathurst Clark Resource Library

900 Clark Ave. West, Vaughan, ON

Andrea Kelly invites you to come out for an informative discussion on the preservation and transfer of special assets in your estate. Very often estates are comprised of assets which warrant special consideration for estate planning purposes, including personal and household effects. Such assets may have high intrinsic value, such as antiques, art or jewellery; others may have emotional value, such as family heirlooms.

Unfortunately, failure to plan for the unique issues that arise when transferring these types of assets may result in the asset(s) being partially or completely unpreserved at the relevant time and/or confusion and animosity amongst your executor and beneficiaries. It is, therefore, worthwhile to consider how you wish to resolve potential problems that may arise when distributing special assets in your estate.

In this session, you will learn:

- Why it is important to have an estate inventory
- Steps to protect assets worth a high dollar value
- Why transferring personal collections can be tricky; for example, art collections
- How to avoid conflict amongst your beneficiaries over sentimental assets