

“Top Ten Estate Planning Mistakes”

- **Owning property as JTWRORS with your spouse or children**
- **Dying intestate or with outdated documents**
- **Unfunded estate tax credit**
- **Owning your own life insurance**
- **Using an IRA as an inheritance tool**
- **Naming the estate as beneficiary**
- **“Use it or lose it” exemptions & missed opportunities**
- **Charitable bequests at death**
- **Incapacity without an appointed guardian**
- **Failure to incorporate disclaimers & trusts**

Presented by Magellan Legal, LLC

**Trusts & Estates, Probate & Probate Litigation
Attorneys Leonard F. Bittner & J. Kevin Meaders**