The DeVries Law Firm, P.A.

YOUR GUIDE TO ESTATE PLANNING IN FLORIDA

Protecting Your Legacy & Providing Peace of Mind

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INTRODUCTION

Estate planning is one of the most important steps you can take to protect your loved ones and ensure that your wishes are honored after you're gone. Whether you're just starting to think about it or you're ready to put your plan into action, it's essential to have a clear and structured approach. At The DeVries Law Firm, we are committed to helping you navigate the estate planning process with confidence, ensuring that your assets are secure and your family is cared for.

Let’s work together to create a plan that aligns with your values, goals, and vision for the future.

Shawn DeVries
Founder, The DeVries Law Firm, P.A.

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WHY ESTATE PLANNING MATTERS

Estate planning is not just about wealth—it's about ensuring your loved ones are protected, your medical and financial wishes are honored, and your legacy is carried out according to your intentions. Without a proper plan, your estate could be subject to Florida's intestacy laws, leading to unnecessary legal hurdles for your family.

What You'll Learn in This Guide:

- Why estate planning is essential
- Key documents every Floridian needs
- How to avoid probate complications
- The difference between retirement planning and estate planning
- A step-by-step checklist to get started

"After meeting Shawn in person to go over our will, we feel that our concerns regarding our will were taken seriously. We realized that there was just a whole lot of miscommunication and not knowing how long certain processes take that resulted in my original review. Shawn is super friendly and is incredibly patient when asked to clarify legal jargon. I will now recommend this firm!"

— Harley Rowand

WHY YOU NEED ESTATE PLANNING

Protecting Your Family & Assets

A well-structured estate plan:

- Ensures your assets go to the right people
- Avoids family disputes
- Minimizes estate taxes and court costs
- Provides financial security for dependents
- Establishes healthcare and financial decision-makers

Without a plan, Florida's intestacy laws decide how your assets are distributed, which may not align with your wishes.

Essential Estate Planning Documents

1. Last Will and Testament – Outlines how your assets are distributed.
2. Revocable Living Trust – Helps avoid probate and manage assets during incapacity.
3. Power of Attorney – Assigns a trusted person to handle financial affairs.
4. Healthcare Directive – Specifies medical preferences if you're unable to communicate.
5. Beneficiary Designations – Ensures life insurance and retirement accounts go to the right individuals.

RETIREMENT PLANNING VS. ESTATE PLANNING

Retirement Planning:

- Focuses on preparing for financial needs in post-working years.
- Key aspects include:
  - Building a savings fund (e.g., 401(k)s, IRAs).
  - Investment strategies for wealth growth (stocks, bonds).
  - Income planning for living expenses and healthcare.

Estate Planning:

- Ensures assets are transferred to heirs according to wishes after death.
- Key aspects include:
  - Creating wills and trusts.
  - Designating a Power of Attorney (POA) for decision-making.
  - Minimizing taxes and legal fees.
  - Setting healthcare directives for incapacity.

Importance of Both:

- Retirement planning secures funds during life; estate planning manages asset distribution after death.
- Without estate planning, heirs may face delays and complications.

Combining both creates a comprehensive strategy that prevents court involvement, secures financial stability for heirs, reduces burdens, and offers peace of mind.

ESTATE PLANNING CHECKLIST

Personal Information

- Full legal name and spouse's name
- Contact details
- Marital status

Family Details

- Names and birthdates of children
- Guardianship preferences for minors

Financial & Legal Information

- List of assets (real estate, bank accounts, investments)
- Debts and liabilities
- Life insurance policies

Estate Planning Documents

- Will and trust documents
- Power of attorney
- Healthcare directive
- Beneficiary designations

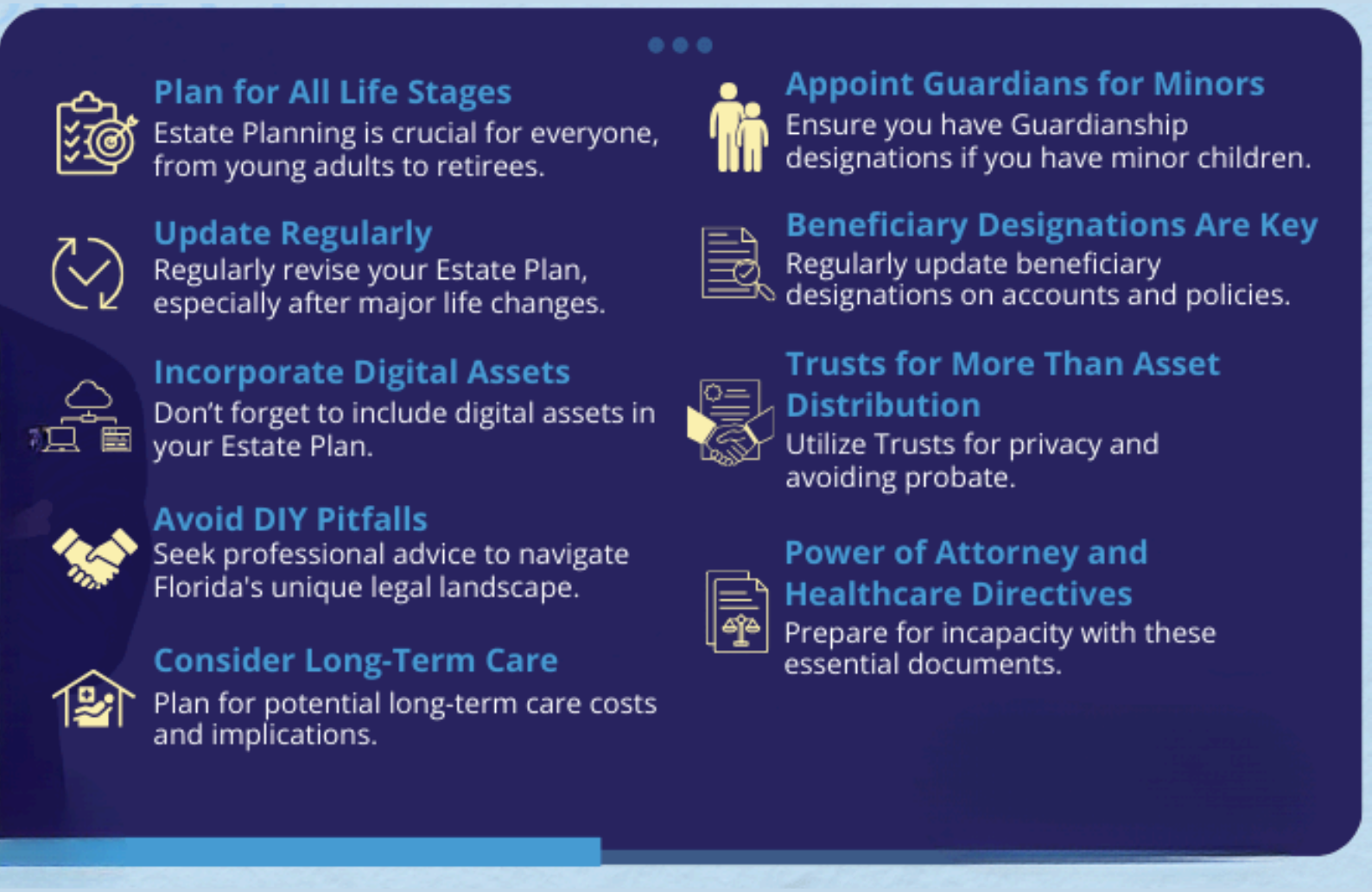
Final Arrangements

- Funeral and burial preferences
- Letters to loved ones

Regular Updates

- Review estate plan every 3-5 years or after major life events

KEY TAKEAWAYS FOR ESTATE PLANNING



Frequently asked questions

F.A.Q

Do I need a will if I have a trust?

Yes, a will directs any assets not in your trust to be transferred into it upon your death and allows you to name guardians for minor children and an executor for your estate. Together, a will and a trust ensure your assets are distributed as intended.

Can I make changes to my estate plan?

Yes, you can make changes to your estate plan as long as you're alive and mentally competent. For example, you can update your will, trust, powers of attorney, and other documents as your circumstances change.

Testimonials

Our Past Clients

Dana Gianaros

"I received my Estate Planning Portfolio last week from Shawn DeVries, and what a beautiful binder and presentation! All the work put into it and how organized it was is truly amazing. Thank you for all your hard work, time, and dedication in getting these prepared for me. I truly appreciate it."

★★★★★

Harley Rowand

"After meeting Shawn in person to go over our will, we feel that our concerns regarding our will were taken seriously. We realized that there was just a whole lot of miscommunication and not knowing how long certain processes take that resulted in my original review. Shawn is super friendly and is incredibly patient when asked to clarify legal jargon. I will now recommend this firm!"

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