



**BRIGHTEDGE**  
WEALTH MANAGEMENT  
— GUIDED BY WISDOM POWERED BY INTELLIGENCE —

# BrightEdge Estate Planning Guide 2025

Guided by Wisdom. Powered by Intelligence.

## Preserve What You've Built

Estate planning is about control, protection, and peace of mind. A well-crafted plan ensures that your assets are distributed according to your wishes while minimizing taxes, probate costs, and family conflicts. At BrightEdge Wealth Management, we help you turn intention into action through strategies that protect your legacy.

## Legacy & Impact

True legacy is about more than passing down assets — it's about passing down values. Your estate plan can reflect not just what you've built, but who you are, helping shape future generations and the causes you care about.

## Core Elements of a Solid Estate Plan

**Wills and Trusts:** Define how assets will be distributed and who will manage your estate.

**Powers of Attorney:** Designate who can act on your behalf for financial or medical decisions.

**Beneficiary Designations:** Keep all account designations aligned with your plan and updated regularly.

**Charitable Giving:** Incorporate giving strategies that align with your values and maximize tax efficiency.

**Business Succession:** For business owners, ensure continuity through buy-sell agreements and trust structures.

## Key Estate Planning Principles

- Review and update estate documents every 3–5 years or after major life events.
- Consolidate domicile property where possible to simplify probate.
- Maintain liquidity for taxes, debts, and final expenses.
- Understand spousal rights and community property laws that may affect asset transfers.
- Use trusts strategically to balance control, privacy, and flexibility.

## BrightEdge Estate Readiness Checklist

- Do you have a current will and durable power of attorney?
- Have you reviewed all beneficiary designations recently?

- Are trusts properly titled and funded?
- Have you planned for liquidity to cover estate taxes and expenses?
- Are charitable and legacy goals incorporated into your plan?
- Have you considered succession or buy-sell plans for business interests?

## Design a Legacy That Lasts

BrightEdge helps clients align their estate documents with their financial vision, ensuring their wealth continues to serve family and purpose long after their lifetime. Schedule a BrightEdge Estate Planning Review and take the next step toward peace of mind.

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