



*Transferring
wealth & wisdom
from generation
to generation*



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CLEAN UP YOUR AFFAIRS

Enjoy Naples with Peace of Mind

"Take a big breath, Naples. The city tops realtor.com's list of the least-polluted cities in America... Florida leads the way in air quality, and Naples is the cleanest city in the state, helped by its natural surroundings, which include the Everglades, Ten Thousand Islands and the Corkscrew Swamp Sanctuary." – Realtor.com (Feb. 2017)

Residents and visitors of SW Florida are already well acquainted with our area's natural beauty and vibrant ecosystem. This recent study ranked metro areas nationwide based on multiple factors and found Naples to be the most pristine.

Unfortunately, it can be difficult to fully enjoy these benefits if mental pollutants such as stress or lack of planning for the future are invading your psyche. There is no time like the present to get organized and revisit past decisions that could potentially cause future headaches. Below are a few suggested topics to foster optimal wellbeing in all facets of your life.

GET ORGANIZED

Don't underestimate the peace of mind which comes by having your affairs in order. Do you have bank accounts? Own property? Have family or people you care about? If so, current estate and financial plans are a necessity. Other topics to consider are hurricane preparations, emergency arrangements for pets, Medicaid applications, and insurance policies. Utilize advisors who are anticipatory, intuitive, and detail oriented.

ESTATE PLANNING

Proper estate planning is crucial to ensure loved ones benefit from your lifetime of hard work. It's important that the legacy you hope to pass on isn't reduced by unnecessary taxation due to lack of preparation. However, estate planning goes beyond simple wealth and asset protection. It also makes your personal preferences involving medical treatment legally binding. If not addressed, you could become dependent on family and friends for long term care.

ADVANCE DIRECTIVES

Although not a fun topic, advance directive is a vital document that outlines your wishes should you become seriously ill, unable to make decisions, or are facing loss of life. Having advance directives in place before they become necessary will help loved ones avoid further emotional distress in addition to avoiding conflicts amongst your children or chosen heirs.

GO PAPERLESS

Help the environment and de-clutter your life by properly protecting and storing important documents digitally. Clarify with your advisors what should be kept on file and what can be recycled. Although it might seem easier to simply toss paperwork into a drawer, family records are much safer and more organized when filed electronically. Advice is readily available on paperless options.

HEALTH BENEFITS OF GIVING

Many individuals from our community generously donate time and resources to support organizations that promote environmental causes. There are numerous opportunities to get involved locally and help preserve our unique wildlife and beautiful surroundings. Leaving the legacy of an unblemished Florida for future generations to enjoy is truly priceless. You just can't give kindness away... it will keep coming back!

Visit www.probate-florida.com to read more about this subject and other estate planning matters.

Ed Wollman is a Florida Bar Board certified Attorney specializing in wills, trusts, and estates with over 26 years of experience practicing in the state of Florida.

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