



Transferring wealth & wisdom from generation to generation



Edward E. Wollman, JD, LL.M.
WOLLMAN, GEHRKE & SOLOMON, P.A.

THIS IS THE YEAR TO GET ORGANIZED

What Should Your Advisors Focus on in 2017?

"Naples-Immokalee-Marco Island, Florida is the nation's highest well-being community. Residents there have the lowest levels of stress in the country, report little depression and eat healthy on a daily basis, the report found. Many of them like their daily activities and enjoy an intellectually lively culture, telling interviewers they learn or do something interesting every day." – Gallup-Healthways poll 2015

We are truly blessed to live in such a beautiful, inspirational area. Southwest Florida is not only naturally exquisite, but also offers an influential community. That said, continued evolution, both personally and financially, is always important. The New Year offers an opportunity to reevaluate your current situation; below are suggestions.

Flexible Plan

It is imperative to understand your current estate and financial plans and actively discuss with your advisors what can be done to maintain control and flexibility. Your preparations should not be a secret and someone you trust needs to be your confidential backup. Whether it's a family member or professional contact, communication is essential.

Review Insurance

Your financial advisors should carefully review every insurance policy to address any adjustments in circumstance. Long term care policies have changed dramatically and the necessity for life insurance has never been more important. Are your assets and loved ones adequately protected?

Financial Plan

Your advisors must communicate to ensure that they're all in sync regarding the extensive legal changes that could potentially occur in 2017. It is crucial to maximize your benefits considering the current political transition.

F.A.T. – File it, Act on it, or Toss it

This is a great mentality that avoids accumulation of unnecessary paperwork. Clarify with your advisors what should be kept on file and what can be recycled. In this age of digital technology there is no need to accumulate much in the form of papers.

Picture Backup

Learn how to protect and store your family photos. There are several excellent digital storage programs and apps designed to backup and protect your pictures online.

Digital Cloud Backup

No longer do clouds create only rain and shade. Today you need to understand the iCloud concept in order to protect important data. In addition, your advisors should be able to further explain how to secure your identity from fraud. This has become a huge problem with far reaching consequences. Identity theft is rampant, especially in this affluent area.

Go Paperless

Why accrue more paperwork if your important documents are already properly protected and stored in a safe place? Advice is readily available on paperless options. Good luck! It's certainly difficult to give up old habits, but the New Year is a great motivator.

Clean Sweep

Get rid of all junk in your life, one pile at a time. Yes, that includes sugar, bad carbs, and of course, toxic people. Don't forget your sunscreen. Read great books.

Hurricane Preparedness

Please refer to the checklist on our website to prepare for an emergency evacuation. This comprehensive list covers not only your personal safety, but also important financial and legal documents, animal care, and medicine management. We recommend that these plans are not only in writing, but also backed up and shared with at least one family member in addition to your advisors.

Get Involved

Collier County is an extremely philanthropic community. Feel more fulfilled by getting involved in local charity work. Plan, build, and leave a legacy; having that peace of mind is truly priceless. Our firm's slogan, *Where Today's Plans Become Tomorrow's Legacy*, is not only catchy, but also true. Nothing is guaranteed in life, so don't leave your affairs up to chance. At Wollman, Gehrke & Solomon, we're always here to help. We look forward to hearing from you soon.

Go to www.probate-florida.com to read more about this subject.
Learn how you can have your cake and eat it too.

Ed Wollman is a FL Bar board certified wills, trusts and estates attorney with 26 years experience practicing in the state of FL.

2235 VENETIAN CT #5, NAPLES, FL 34109
(239) 435.1533 | (239) 435.1433 FAX