



Estate Planning, Trusts & Probate



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Your estate plan provides an organized, deliberate road map to passing on the valuable assets you have created in your work and family life. Bullivant Houser Bailey helps create plans that honor your needs by drawing on experience in estate planning, business practices and litigation.

The plan we help you create will reflect your needs and circumstances while paying close attention to current legal developments and trends. No plan is static. That's why Bullivant attorneys work hard to remain current on changes in the law. That means we can recommend changes to your plan over time, as appropriate, to ensure that it continues to reflect your interests.

Ask these questions as you evaluate your estate plan

legal counsel: *(Answers on reverse.)*

- Why an estate plan?
- What is a revocable trust (also called a living trust) and how is it different than an estate plan or will?
- How often should I review or change my estate plan?
- Is my estate subject to special estate taxes?
- I own a business, but I want my family to benefit from it after I'm gone. Is there anything I can do?
- How do children affect my choices in an estate plan?
- I own property in more than a couple of states. Does that make a difference?

Our attorneys focus on these estate plan issues:

- High net worth families/individuals
- Trust, probate and charitable entity administration
- Dispute resolution
- Cross-border
- Business succession planning
- Income, estate and business taxation
- Post-mortem planning
- Probate, wills and trust litigation
- Non-traditional couples

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Ask these questions as you evaluate your estate plan legal counsel:

- **Why an estate plan?** An estate plan gives you comprehensive control over the disposition of your estate—money, property and other assets—upon your death. More than just a will, a complete estate plan also anticipates potential incapacity and other possible problems.
- **What is a revocable trust (also called a living trust) and how is it different than an estate plan or will?** A revocable trust is a will substitute and, if properly structured and administered, can help your estate avoid probate. A revocable trust is not the best choice for most clients, but there are situations in which a revocable trust provides additional value.
- **How often should I review or change my estate plan?** An estate plan should be reviewed periodically, particularly at any time when significant changes occur in the law. Your circumstances may change, too, and you should be prepared to make changes to a plan that reflects those circumstances.
- **Is my estate subject to special estate taxes?** Oregon and Washington both have estate taxes with two of the lowest exemptions in the nation. A comprehensive plan, tailored to your needs, will minimize your tax exposure.
- **I own a business, but I want my family to benefit from it after I'm gone. Is there anything I can do?** Yes, we can help you with business succession planning to help ensure that you successfully transition the company to your chosen successors and preserve as much value as possible.
- **How do children affect my choices in an estate plan?** Children play a significant role in most estate plans. What is often overlooked is how you express your values and philosophy in a way that can be passed along to your children. We can help create flexible plans that provide for your children, protect assets you leave them from their creditors or future ex-spouses, and provide your children with as much control as you would like them to have.
- **I own property in more than a couple of states. Does that make a difference?** Yes, it often does because state rules around property ownership vary and, without planning, your estate will have to open a probate in each state in which you own property. Your plan should address those differences, help reduce administration costs, and be updated when conditions change.

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