

Estate planning is an act of caring for your loved ones and beneficiaries.

Without proper planning, the IRS can take a huge bite out of your assets after your death, and the courts can decide everything from the distribution of your estate to who will care for your children.



That's a scenario that no one wants, and preparing a will and other legal documents is critical in order to avoid it. At Copeland Wealth Management, we partner with the best estate-planning experts in the business to help eliminate uncertainties and minimize taxes. Together, we will work to create the elements of a solid plan, including:

- A will (and a living will)
- Trusts
- The designation of beneficiaries
- Powers of attorney

Our goal: To maximize the share of your assets that your beneficiaries will receive, to ensure that *you* control which of your assets goes to whom, and to help provide clarity and peace of mind for those you care about.