|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Planning Options** | **Our Funded Living Trust** | **Intestate Succession** **(No Will)** | **Joint Tenancy** | **Will** | **Testamentary or Unfunded Living Trust** |
| **Avoids Probate** **at Death of First Spouse** | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\MUANAV8D\MC900441310[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png |
| **Avoids Probate at Death of Second Spouse** | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\MUANAV8D\MC900441310[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png |
| **Provides Maximum Tax Savings** | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\MUANAV8D\MC900441310[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | **Maybe** |
| **Avoids Need for Conservatorship** | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\MUANAV8D\MC900441310[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png |
| **Provides Family Privacy** | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\MUANAV8D\MC900441310[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png |
| **Establishes Trust** **for Beneficiaries** | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\MUANAV8D\MC900441310[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | **Maybe** |
| **Prevents Attachment of Beneficiary’s Assets** | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\MUANAV8D\MC900441310[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | C:\Documents and Settings\Reception\Local Settings\Temporary Internet Files\Content.IE5\9Y5S6EH3\MC900432537[1].png | **Maybe** |