



IT'S YOUR LIFE

Hire a Specialist!

Your life's work should not be left to chance

If a family member had a serious heart condition that required surgery, we would surely seek out the best cardiovascular specialist available to perform the operation. The same should hold true when seeking advice on our estate and business succession plans.

Our families and businesses deserve the benefit of expert advice. We need legal advisors and other facilitators specifically trained and experienced in dealing with the estates of business owners. Many lawyers who are general practitioners are adept in handling common legal affairs. But, few of them would attempt to develop a sophisticated estate plan that could provide the specialized legal documents you may need. Just as we would not likely ask our family doctor to perform open heart surgery, neither should we assume that a generalist attorney is qualified to develop a complex estate and business succession plan.

In addition to technical expertise, estate-planning attorneys often have developed the skill to explain complex issues to us in understandable terms. Since these attorneys regularly deal with multifaceted challenges facing family business owners, they can focus on listening. And because they may be more skilled and experienced in working with other advisors, they have a greater ability to direct the planning process to a successful—and cost-effective—outcome.

Federated is committed to helping family business owners complete this important planning. This is why our marketing representatives can help our clients locate attorneys specializing in estate planning and personally help facilitate much of the “leg work” that can make the process go more smoothly. Your local Federated representative would be happy to visit with you about this.

After all, your life's work should not be left to chance.

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