



A University of Hawai'i Cooperative Extension Service Project

www.ctahr.hawaii.edu/tcym

Course Objectives



- Increase your knowledge about financial planning
- Improve your ability to make informed decisions



Foundation of the Estate Plan

Goodsill Anderson Quinn & Stifel

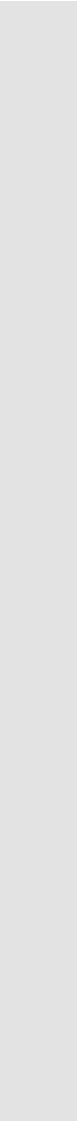
A Limited Liability Law Partnership

Presenter



Judy Yuriko Lee,
Esq., CFP®, Partner

Planning Techniques



Lesson Objectives



- Identify the purpose and need for proper estate planning
- Understand the advantages of establishing and funding revocable living trust

Revocable Living Trust



- Retain control
- Asset management in the event of incapacity
- Avoid probate for assets transferred to trust

Revocable Living Trust



- Incorporate distribution standards
- Utilize generation-skipping transfer tax exemption

Supporting Documents



- Transfers to trust (deeds, assignments)
- Pour-over will
- Statutory power of attorney
- Advance health care directives ("living wills")

Website &
TV Channels



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- TV channels

- 354

- 355

Credits



We would like to thank the following for their support:

- University of Hawai'i at Mānoa
 - College of Tropical Agriculture & Human Resources, Cooperative Extension Service, Department of Family & Consumer Sciences
 - Information Technology Services-Academic Technologies
- Judy Yuriko Lee, Esq., CFP®, Partner
Goodsill Anderson Quinn & Stifel
A Limited Liability Law Partnership LLP

Mahalo Special Guests



Actors & Actresses in Skits

- Susan Pang as Mrs. Kai
- Travis Agustin as Kimo
- Judy Lee as Estate Attorney