



Estate Planning

Estate planning is the lifelong process of preserving your assets and making sure they go where you want them to at your death. Plan now to conserve your estate.

How Much of Your Money Will Go To Your Heirs?

Making decisions now regarding your estate can save your family a lot of trouble – and money – when the time comes.

What Happens to Your Estate at Death?

Your assets are subject to a number of expenses that can significantly reduce the size of the estate left for your heirs. Proper estate planning can minimize these expenses.

ASSETS

You've Worked Hard to Build

- Personal Property
- Retirement Plans
- Stocks and Insurance
- Business Interests
- Real Estate

EXPENSES

Paid to Settle an Estate

- Federal estate taxes*
- State estate and inheritance taxes
- Probate administration costs
- Attorney/CPA fees
- Debts and obligations
- Mortgages
- Other expenses

WHAT'S LEFT

After Settlement of Estate

Proper estate planning will leave more money for your loved ones.

Life insurance and annuities underwritten by:
UNITED OF OMAHA LIFE INSURANCE COMPANY
3300 Mutual of Omaha Plaza, Omaha, NE 68175
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