

to



*Protecting What You Value Most Through  
Estate Planning and Asset Protection*

## ***Providing Solutions That Secure and Enhance Your Wealth and Your Legacy***

Everyone understands the benefits of having insurance to protect your assets from unanticipated events. Hazard and casualty insurance is necessary to provide protection from the risks of fire, floods and wind damage. Liability insurance is necessary to provide protection from the risks of auto accidents and personal injury. But what can you do to protect your assets from claims in excess of your insurance or from risks of lawsuits or from unexpected business liabilities or from an overabundance of tax consequences? Fortunately having an asset protection plan in place can help insulate you from these potentially significant risks.

We believe in providing you with effective solutions so that you can have confidence that your assets and your legacy are protected. An effective asset protection plan needs to be in place before a lawsuit or claim is made against you, and well in advance of your retirement or death, so it is important to take the step toward greater protection today.

Wild Felice & Partners is a full-service, Fort Lauderdale, Florida based law firm with a specialty in asset protection. We utilize a combination of estate planning, real estate law, corporate formation, family law, and asset structuring to assure that our clients are protected from potential litigation, creditors, and any other threats that may be looming. A properly designed asset protection plan can accomplish many of your most important objectives:

- Protection of family savings and investments from lawsuits and claims.
- Protection against inadequate or unavailable insurance coverage.
- Insulation of rental properties reducing your exposure to potential lawsuits.
- Protection of business assets and accounts receivable from potential claims.
- Elimination of probate.
- Reduction of estate taxes.

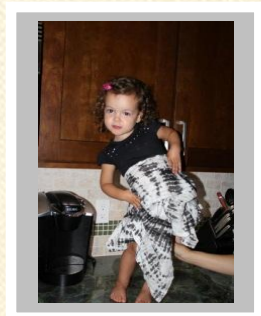


## **Fresh Start to a New Year Edition**

It's a New Year, many people like the idea of starting fresh or updating the old. The start of the New Year is the perfect time to think about where you are so you can move forward. In this issue we will discuss:

- Reviewing your Estate Planning Documents
- Your Documents in a Safe Deposit Box: big mistake
- Estate Planning documents everyone needs

*Every American should have an  
estate plan in place but the need for  
comprehensive estate planning is  
even greater when you have  
children.*



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## Estate Planning Updates are Crucial: Not Just "Set It and Forget It"

It's a New Year, many people like the idea of starting fresh or updating the old. The start of the new year is the perfect time to think about where you are so you can move forward. Prudent patients undergo periodic medical checkups; savvy motorists take their cars in for routine mechanical servicing. Effective estate planning must also be seen as an ongoing activity, not a one-time ordeal to avoid forever after.

Do not live in denial – only to die and leave your loved ones the extra burden of straightening your affairs. Instead, maintain an even financial keel and economic equilibrium with adaptable estate plans.

What was valid yesterday is total rubbish today. What works for neighbors or coworkers may fail you miserably. Unforeseen snares and snafus lie in wait to snag the most carefully constructed estate plans. Many circumstantial changes may arise that affect major impact upon your life – without a moment's notice. A Florida estate planning attorney has the training and skill to protect against such potential disasters – before they even get a chance to strike.

Like most licensed legal practitioners, Florida estate planning attorneys possess specialized expertise and substantial experience to construct a comprehensive estate plan on your behalf. In addition, ethical, dedicated professionals pride themselves on helping clients and their loved ones achieve optimal outcomes - irrespective of individualized circumstances and situations.

Why add to your loved one's distress when you die? A far better strategy is to devise a legacy that imparts peace of mind and financial freedom through comprehensive estate plan updates.



Michael D. Wild is a Florida attorney specializing in the areas of estate planning and asset protection. For more information on successful Florida estate planning and asset protection techniques, please contact the South Florida law firm of Wild Felice & Partners, P.A. at 954-944-2855 or via email at [info@wfplaw.com](mailto:info@wfplaw.com) to schedule your free consultation. Protecting what you value most.



## Did you know?

Your Estate Planning documents won't do you or your family any good if no one can find them. Sit down with your family, especially the one who you've designated as a health care agent, and explain what you've decided. Give them a copy of your documents and let them know where the originals are.

Review your papers every few years. Keep them in a safe, easily accessible place such as a secure file cabinet. Avoid a safe deposit box if you are the only one with access to it. The process to open it if you are unavailable will be unnecessarily burdensome on your family. If your family situation changes through the arrival of grandchildren, for example, or a divorce, you probably will want to make changes.

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## Think Now to Avoid Family Confrontation Later

People don't want to think that an accident or illness would prevent them from saying what they want or don't want, when it comes to their future medical care. We tell ourselves: I have plenty of time to take care of those things later.

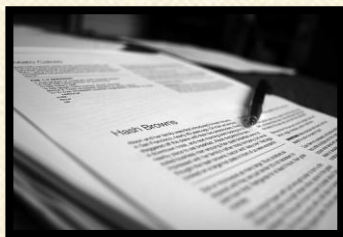
But things do happen in our lives that are out of our control. Your family and friends need to know how you want them to handle situations if you're too ill to tell them. If they're left guessing, a conversation can quickly disintegrate into a confrontation. The fallout can result in guilt, uncertainty and arguments. Know what you need and contact an Estate Planning Attorney.

A living will alerts medical professionals and your family to the treatments you want to receive or refuse, and under what conditions. This will only go into effect if you meet specific medical criteria and are unable to make decisions.

A health care power of attorney delegates a spouse, trusted family member or friend to make health care decisions for you if you are unable to do so. Be aware that a regular durable power of attorney only covers financial matters. You will need separate Powers of Attorney for finances and health care.

A Power of Attorney is a legal document in which you give another person legal authority to act for you. It allows your agent to carry out financial tasks for you when you cannot do so. This might include paying your bills, managing your property, and handling other money matters. It can also involve more complex matters like selling real estate.

Put it in writing, but remember a letter of instruction is not technically a legal document. Contact an Estate Planning Attorney so they can apprise you of any relevant changes in the law that might affect your documents.



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## Friendships and Misfortune

The old fable about the travelers and the bear narrates how at the sight of a bear one traveler hid in a tree and left his friend behind to deal with the bear alone. Having no other option the traveler played dead and after a few tense moments the bear whispered in his ear and left. After the danger passed, the traveler came down from the tree and asked his companion what the bear said. The companion responded, he said "Never travel with a friend that deserts you at the approach of danger."

Most people believe that friends and family will always support and act in their best interest. The only way to be sure is to think ahead and plan for those moments when misfortune crosses our path.

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