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PERSONAL CONSULTATION

Maybe we should talk if...

- One spouse is the beneficiary of a life insurance policy on the other spouse.
- The husband and wife jointly own their house, investment, brokerage, or bank accounts.
- Your existing wills and trusts were executed prior to 2001.
- Out of state real estate, residential or investment property, is owned by one spouse or both spouses jointly.
- A child has a strained marriage that may end in divorce.
- A financially secure retired couple has substantial Qualified Plan (401(k), 403(b), IRA) assets.

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