Couldn’t make the webinar? Start here.

A two-minute read for the spouse or partner who wasn’t in the room.

Your husband, wife, or partner just attended our estate planning webinar — and brought this home because this decision affects **both of you**. You don’t need to have been there. Here’s the short version of what they heard, and a quick way for the two of you to see how protected your family really is.

The one idea that matters most

Most estate plans don’t fail because the documents are wrong. They fail because the planning **stops at the documents**. A will or a trust is just paper until it’s coordinated, put into effect, and kept up to date. When that doesn’t happen, families end up in court, assets get lost, and the people you love are left to clean up the mess — usually at the worst possible time. And if you don’t have a plan in place yet, the risk is simpler still: the state already has a plan for your family — and it’s almost never the one you’d choose.

Questions every family should be able to answer

You don’t need to have an estate plan to do this — that’s exactly the point. Check each box the two of you can honestly say “yes” to. Anything you leave blank is something a good plan is built to fix.

- ☐ If something happened to one of us tomorrow, the other would know where **all our assets are** — every account, policy, and piece of property.
- ☐ If one of us couldn’t make decisions, someone we trust could **step in immediately** — without going to court.
- ☐ Our family would **avoid probate court** — the public, slow, expensive process.
- ☐ Our home and savings would be **protected** if either of us ever needed long-term care.
- ☐ We’ve decided **who would make our medical and financial decisions** if we couldn’t.
- ☐ What we’ve built would pass to **the people we choose** — the way we intend.
- ☐ Our children or heirs would **inherit without confusion or conflict**.
- ☐ We have a plan that **actually works when it’s needed** — not just documents in a drawer, or nothing at all.

Any box you left blank is a gap most families don’t discover until it’s too late — and all of it is fixable. That’s exactly what a Strategic Planning Session is for.

What a complete plan actually protects

- Your family stays **out of probate court** — no public, drawn-out, expensive process.
- Your home and savings are **protected from long-term-care spend-down**.
- Someone you trust **can act immediately** if you're incapacitated.
- Your children **inherit cleanly** — no confusion, no conflict, no scramble.
- The plan **works when it's needed**, because it's funded and kept current.

Why families trust Monteforte Law

- Led by attorney **Michael Monteforte, Jr.**, who trains other Massachusetts attorneys in estate planning and elder law.
- **300+ five-star** Google reviews.
- Named a **Boston Magazine Top Lawyer**.
- Licensed in **Massachusetts and New Hampshire**.

Your next step — together

Book a **Strategic Planning Session**. It's a working session where we look at your specific situation and the two of you decide what's right for your family. **There's no obligation to move forward.**

As a webinar guest: **$450** (regularly $850), credited toward your plan. This rate is held for 24 hours, and appointment times fill quickly — so book yours now.

Scan to book
montefortelaw.com/
strategic-planning-session