

David J. Boczar, CFP®, CFA

12 On The Money



(02/27/04) **NORWALK** (reprint) - This week's **12 On The Money** report focuses on estate planning. Without the right strategies, some of your estate can be lost to taxes, fees, and other expenses upon your death.

News 12 Connecticut's Rebecca Surran speaks with David Boczar, a financial planner, for some advice on protecting your estate.

Related Link:

www.davidjboczar.com

Estate Planning:

- Review your will regularly
- Know estate tax credit exemption changes
- Use Credit Shelter Trust if needed
- Use Irrevocable Life Insurance Trusts, "ILITs"
- Use "gifting" strategies

Video: <http://ondemand1.cv.net/news12/FCOM227T.asx>

Please seek the guidance of your professional tax and legal advisors before making any decisions. For more information about David J. Boczar, CFP®, CFA, please call 203-226-0222 or visit www.davidjboczar.com.