

Estate Planning is about ...

Everyone You Love and Everything You Ownsm

We know that estate planning follows this thought-process: *"I want to control my assets while I am alive and well. If I should become sick or disabled, I want to be cared for by people that I have chosen in a manner that I have prescribed, knowing that my loved ones are also well cared for. When I die, I want to give what I have to whom I want, when I want, and in the way I want. If I can, I want my plan to save every last dollar of professional fees, court costs, and taxes possible."*

TEAM BUILDING Effective Estate Planning is a team endeavor. By uniting clients and other tax and financial advisors into a cohesive estate planning team, the client's best interests are served. With over 30 years of experience, I know that people will only implement useful and workable solutions when all of the members of the Estate and Financial Planning team are working together.

EDUCATOR-COMMUNICATOR The Tax Code is complicated and daunting. I understand it and communicate clear and understandable explanations of this complex web of laws so that clients see and understand how the techniques I use allow them to achieve their Estate Planning goals.

COUNSELOR The psychology of Wealth Transfer Planning requires that clients discover, explore, and understand both the technical and non-technical basis for their specific plan design. There are powerful forces at work within people that motivate them or prevent them from effectively planning their estates. I am adept at helping clients focus those forces to produce meaningful and successful estate plans.

Estate & Gift Tax Planning ~ Post Mortem Trust Administration ~ Charitable Tax Planning
Probate ~ Incapacity Planning ~ Business Succession Planning



ZabnerLaw

Estate Planning, Trusts & Probate

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Jeffrey M. Zabner, Attorney and Counselor, is a Certified Specialist in Estate Planning, Trusts, and Probate Law by the State Bar of California Board of Legal Specialization. He is "AV" Peer Review Rated (highest levels of skill and integrity; height of professional excellence) and is admitted to practice in California, Florida, and Michigan.

