

Estate Planning Newsletter – July 2022

Section 1.01 2022 Embrace Aging Forum Recap

Chambliss Law hosted the 2022 Embrace Aging Forum on Tuesday, June 28 at The Westin Chattanooga. We cannot thank everyone enough for helping make this event a huge success. This year's event featured:

- Book signing with keynote speaker and New York Times Best Selling Author and actress, Tembi Locke
- One-on-one time with sponsors and exhibitors
- Valet parking, continental breakfast, and a lunch buffet

Attendees had the opportunity to choose between two different information-filled breakout sessions after kicking off the day:

- Planning to Protect Your Finances and Assets
- Living Your Best Life: For You & Your Loved Ones

After the breakout sessions, distinguished keynote speaker Tembi Locke gave a presentation. She discussed her New York Times Best Seller "From Scratch," a memoir about her journey as a primary caregiver for her late husband, and the importance of creating community when it matters most. Her book is also being adapted as a Netflix limited series produced by Reese Witherspoon, which is expected to air soon.



Estate Planning Resources



How to Deal with an Estranged Child in Your Estate Plan

Unfortunately, not all families get along. If you are having problems with one of your children, you may not want them to benefit from your estate. There are several strategies for dealing with an estranged child in your estate plan...

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Dynasty Trusts: A Tax-Efficient Way to Pass Wealth Down Through the Generations

If you want to pass money to future generations without having it subject to gift and estate taxes, then a dynasty trust may be right for you. A dynasty trust allows trust assets to be used for the benefit of multiple generations while keeping the assets out of the grantor's and the beneficiaries' taxable estates...

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Through PASS, People With Disabilities Can Pursue Work Goals Without Losing SSI Benefits

To qualify for Supplemental Security Income (SSI), a federal program that provides people with disabilities a monthly stipend, individuals must conform to very strict income and asset limits. Often, SSI beneficiaries who could hold a job opt not to because they worry about losing their benefits if they earn too much. While this is a valid concern, a program known as PASS offers these individuals the opportunity to pursue their professional ambitions while continuing to receive SSI payment...

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