

# Estate & Trust Planning

**Addison**  **Avenue**  
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# Tax Planning

- Marital Deduction
- Exemption (\$12,920,000)
- Portability
- Annual Gifts (\$17,000)
- Capital Gains Tax
- Property Tax

A decorative graphic at the bottom of the slide featuring rolling hills in shades of green and brown, with a large orange sun partially obscured by the hills.

**O'DONNELL & ASSOCIATES**

[www.estateandtrustplanning.com](http://www.estateandtrustplanning.com) 650-853-7183

# Incapacity Planning

- **Durable Power of Attorney for Property Management (Gifting?)**
- **Advance Health Care Directive**
- **Trusts**
- **Probate Code 3101 Spousal Petitions**
- **Conservatorships**

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# Death Planning

- Intestate Succession
- Gifting
- Direct Transfers
- Joint Tenancy
- Transfer on Death Deeds
- Wills
- Trusts

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# Thank you!

## Jeff Alejandro & Endry Surjanto

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Questions?