

Honesty IS the Best Policy

**By Matthew Crider, JD
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Estate Planning Isn't the Time to Hold Anything Back

You wouldn't want a surgeon to operate on you without first looking at the X-rays. You wouldn't want a contractor to build your home without having blueprints.

And you most definitely don't want someone handling your investment or estate planning without having all the information they need. This is ALL the information that you have, as well as goals, dreams and aspirations. A race without a defined finish line never ends, at least not well.

"Yes, you need to let your estate planning attorney know about all of the intimate details of your life," [Washington, D.C., attorney Julie Garber wrote on About.com](#). "Now is not the time to be shy ... What's the worst that can happen if you fail to disclose all of this important information to your estate planning attorney? Your estate plan will be based on false, inaccurate, and/or misleading information, and could end up being a total disaster and land your beneficiaries in court."

"Your estate plan is only as good as how much you share with your estate planning attorney," South [Carolina lawyer Evan Guthrie wrote in a recent online article](#). "This means that your attorney can only make a plan with the information they are given. More often there are facts the client will hold back out of fear of shame or discomfort that can dramatically alter the plan. Family problems or personal problems of potential heirs must be shared with the estate attorney to make sure the best estate plan is made."

"Most problems in estate planning occur not from poor drafting of documents, but from crucial information being withheld, often in ignorance," [San Francisco attorney Audrey Howitt wrote on Oct. 23, 2011, on Helium.com](#).

So, bite the bullet and tell all.

"And what should you do if there are some major skeletons in your closet but you really don't feel comfortable discussing them with your estate planning attorney?" lawyer Garber asked. "Look for another estate planning attorney."

About Matthew Crider, J.D.

Matthew Crider formed [Crider Law PC](#) in 1999 so he could help individuals and business owners by providing creative solutions and be their trusted advisor and legal counselor. He serves his clients by listening closely to their goals, dreams and concerns and working with them to develop superior and comprehensive estate and asset protection plans. His estate planning practice focuses on preserving and growing wealth by providing comprehensive, highly personalized estate planning counsel to couples, families, individuals and businesses.

