



**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.

## Steps for avoiding estate planning mistakes

By Matthew Crider, JD | Family Wealth Protection Attorney

Even the most savvy seniors make mistakes when they get around to estate planning.

The web site [lifehealthpro.com](http://lifehealthpro.com) has listed some of the most common mistakes people make, mistakes that can lead to expensive and time-consuming disputes.

Here are steps you can take to avoid the most common mistakes:

1. Get all your estate planning documents together in one place. Wills, beneficiary designations, trusts and medical directives that can't be easily located can cause havoc.
2. Make sure beneficiary designations are in place. These can trump a will.
3. Make documents accessible to those who need them. A secure online document storage service is one answer.
4. Fund revocable living trusts. Such trusts offer multiple benefits including probate avoidance. But if you fail to transfer money to the trusts they are empty shells that offer nothing.
5. Don't forget about state inheritance taxes. Most estates avoid inheritance taxes due to the \$5.25 million federal exclusion, but state inheritance taxes may still be trouble. Beneficiaries are the ones who have to pay them.