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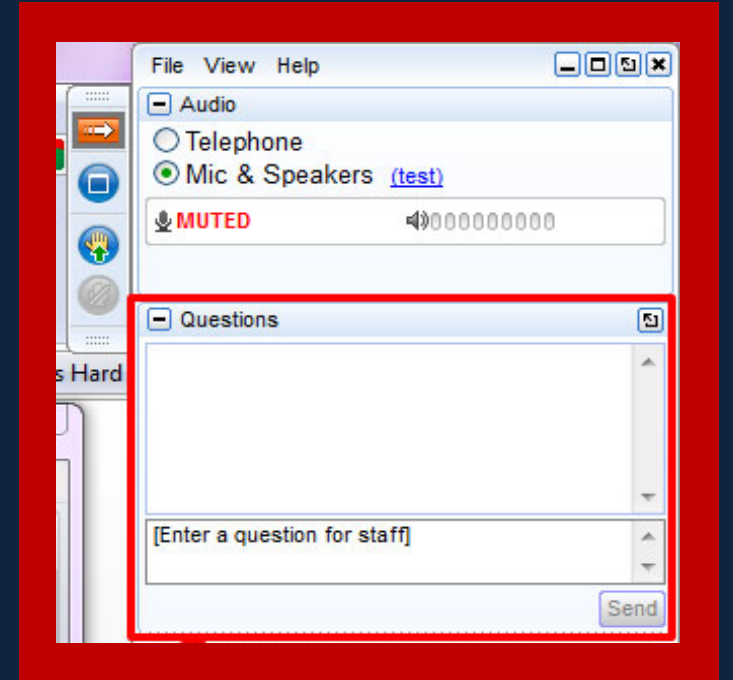
## Estate Planning in 2021

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A How-To on Protecting Your Assets  
and Providing for your Loved Ones

Q & A

HAVE  
QUESTIONS?



# ABOUT HUGHES FINANCIAL SERVICES



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# TODAY'S SPEAKERS



**SCOTT HUGHES, CFP<sup>®</sup>, MBA**  
Managing Partner & Financial Advisor



**MARTHA SOTELO, ESQ.**  
Principal, Vaughan, Fincher & Sotelo, PC

**Why is having an estate plan essential?**

**What is the difference  
between a will and a trust?**

**Where would you start  
when creating an estate plan?**



**Who are the key people – or Fiduciaries –  
in an estate plan and what do they do?**

**How often should you  
review or update your estate plan?**

Currently, the estate tax applies to individuals with a net worth of \$11,700,000 and for married couples, \$23,400,000.

What assets are included in that amount?

Are the exemption amounts going to change?

What has changed in the estate planning world recently, especially in light of the COVID-19 pandemic?

**What is the biggest mistake you see when it comes to estate planning for families?**

Should adult children  
have their own estate plan?



Martha Sotelo, Esq. | Principal, Vaughan, Fincher & Sotelo, PC

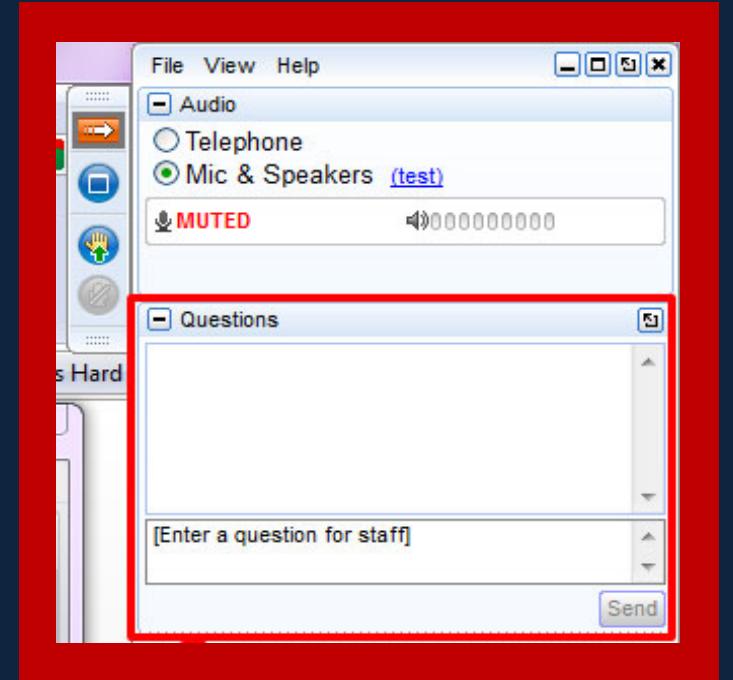
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Q & A

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Hughes Financial Services will be hosting **20-minute virtual educational Lunch & Learn sessions** during which we'll do a deep dive on an array of financial planning topics. Grab your device and lunch and join us each **Wednesday at 12:00 pm** to juice up your financial planning knowledge!



WEDNESDAY, MARCH 3<sup>rd</sup>

**Estate Planning in 2021 with Guest Speaker Martha Sotelo, Esq., Principal, Vaughan, Fincher & Sotelo, PC**

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WEDNESDAY, MARCH 10<sup>th</sup>

**Tax Planning in 2021: What to Expect & Plan For with Guest Speaker Liz Nuti, President, Accounting & Tax Solutions, Inc.**

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WEDNESDAY, MARCH 17<sup>th</sup>

**ESG Investing: What is it and should you consider it in your financial plan?**

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WEDNESDAY, MARCH 24<sup>th</sup>

**The 2021 Plan to Protect Yourself Against Identity Theft and Cybercrimes**

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WEDNESDAY, MARCH 31<sup>st</sup>

**The Many Ways to Invest in Real Estate**

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WEDNESDAY, APRIL 7<sup>th</sup>

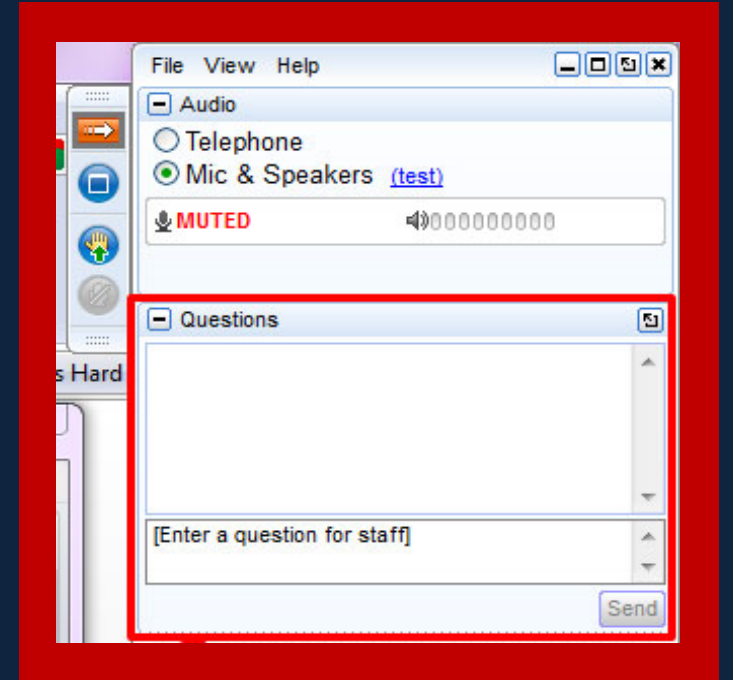
**2020 Was the Year of the Roth – What About 2021?**

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Q & A

HAVE  
QUESTIONS?





If you have questions about this presentation, please contact us at:  
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