

# The 5 Biggest Estate Planning Mistakes

And How to Protect Your Wealth,  
Your Family and Your Legacy



# Why Estate Planning Matters

A well-structured estate plan can help you:



**PROTECT**  
your loved ones



**PRESERVE**  
your wealth



**REDUCE**  
unnecessary tax



**AVOID**  
costly complications



**CREATE**  
a lasting legacy

# What You Will Learn

In this guide we look at the 5 most common estate planning mistakes and how to avoid them.



## **MISTAKE 1**

Thinking your gift is safe after seven years.



## **MISTAKE 2**

Your assets are worth less than HMRC thinks.



## **MISTAKE 3**

Thinking your big red folder means your estate is organised.



## **MISTAKE 4**

Leaving everything to your spouse and hoping your children inherit it.



## **MISTAKE 5**

Your estate tearing your family apart.



# A Stronger Future Starts Here

By avoiding these common mistakes, you can protect your wealth, your family and the legacy you've worked so hard to build.



**PROTECT**  
the people who  
matter most.



**PRESERVE**  
what you have built.



**PASS ON**  
a lasting legacy.

LET'S BEGIN

**Mistake 1 →**