



LAW OFFICES OF

Michael Kuldiner, P.C.

ATTORNEYS AT LAW

Estate Planning Guide

Helping clients begin and complete a comprehensive estate plan



This is a publication of The Law Offices of Michael Kuldiner, P.C.
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Estate Planning Basics

Why Wait for Peace of Mind?

If you are waiting for the right moment to start estate planning, here it is! There is really no better time than now – as you’re thinking about it – to get started. With so many legal documents to arm yourself and your family against problems, it only makes sense to gather your thoughts and get the inevitable concerns ironed out now.

Many times, estate planning is seen as a concern for older individuals; however, tragedy can strike anyone regardless of age. Just because a young couple does not have a large estate with many assets at this time, does not mean they should not consider the care of their child in the event of their untimely deaths. Certainly not the kind of thinking anyone wants to do, but peace of mind and the future of a child is worth the extra care.

That’s why at our office, we encourage clients of varying ages and stages of life to create and revisit their estate documents every few years. Those who have recently divorced should also consult with an attorney about how divorce has affected their estate plan. Beneficiary changes and legal rights to assets can change and estate planning documents should reflect the most up to date wishes of the testator (person who has created a will).



You have insurance for auto, home, and life – what about after that? A will and estate plan is not an insurance policy, but does provide the assurances that assets like real estate, collectibles, and intangible assets are distributed properly. Leaving that up to heirs can create a legal nightmare that lands families in courtrooms. That’s why it’s smart to start with a will – setting forth those wishes in a formal document is an affordable and direct way to sort out your wishes.

Once you get a will, there are a variety of other documents that an estate planning attorney can prepare. Based upon your needs, business documents, trusts, advanced directives can be drafted and create a comprehensive estate plan. A brief summary of common estate planning documents are explained on page three of this guide,

Only an experienced estate attorney can explain which documents you need and just as importantly, which ones you don’t need. Online sites can be confusing and lead you to create more paperwork than you need. We can help you review your assets, beneficiaries, life insurance policies and investments to assemble the right estate plan for the best interests of you and your family. 

Types of Documents

Making the tough decisions now to guide family through the legal process later



Wills and Trusts

A will determines who will carry out administering your estate and how all of your assets are distributed to heirs. A trust determines what, when, how and where gifts or property are distributed among heirs or beneficiaries. In Bucks County, a will is first handled by the Bucks County Register of Wills before being handed over to Orphan's Court and recorded.

Final Wish Requests

This is the document used to formalize and any specific requests or details you'd like to have acknowledged for memorial services. Location, and religious observances can be detailed in this type of document.

Living Will

In the event that you are incapacitated in such a way that you can no longer communicate, a living will dictates how your health is managed. Also known as an advance directive, this document is legally binding for medical professionals and ensures your health is treated in accordance with your wishes.

Power of Attorney

A power of attorney provides a designated individual the rights to carry out legal actions on your behalf. It establishes a principal/agent relationship and allows the agent to make decisions for the principal. This is of great importance when it comes to banking, medical decisions, and legal decisions.

Prenuptial Agreement

Not often thought of as an estate planning document, a prenuptial agreement serves a planning purpose in the event that a couple divorces. Whether or not many assets are involved at the time of marriage, it enables a more fluid distribution of assets in the event of divorce.

We help clients review and identify needs within their existing estate plan, as well as start from square one with a simple will. We work with your other planning professionals to guide you toward the best plan for you and your family. 🏠

A Living Trust

Trusts can help avoid probate, reduce taxes, or set up long term property management. It is created while you are alive, designating an individual as a trustee to hold legal title of a property for you.

- Asset protection trusts
- Charitable trusts
- Generation skipping trusts
- Life Insurance trusts

These are just a few of the many types of trusts that exist to fit your needs. Ask about how a trust can work for your family.

What Makes Us Different

At the Law Offices of Michael Kuldiner, P.C., we champion an amicable and efficient methodology to handling divorce and custody matters. With compassion, experience, and a practical approach to family law, we listen to clients and provide results.

Our experienced team of professionals will handle every aspect of your case with the upmost care and diligence; that's why our clients trust and recommend us to their friends and family. Each client receives a unique plan of action tailored to individual family needs.

By listening to our clients and allowing them to remain in control, we can apply our extensive family law experience in a way that gets the best results possible. Not all cases are the same, even if they do go through the same process.

Professionals who care

Above all else, our practice maintains a strong and personable rapport with our clients. Chances are, clients are coming to us during the toughest time in their lives—we take that personally and it shows in the service we provide.



Michael Kuldiner, Esquire

Michael has in-depth knowledge in family law matters such as divorce, support and custody. He is also part of the expanding field of collaborative divorce and has completed his certification in this discipline. Michael has been recognized by his clients/colleagues as a "SuperLawyer", nominated for the Bucks Happening, "Best Of" list and was selected into The National Trial Lawyers: Top 40 under 40 list.



Michael Petro, Esquire

Attorney Petro has a decade of experience in litigating divorce, family law and civil matters in Bucks, Montgomery, and Philadelphia Counties. His area of emphasis has focused on representing women and children of domestic violence. He also brings comprehensive experience in medical malpractice and other areas of law.