

# Marilyn Suey Offers Estate Planning Tips to Preserve Your Assets, Avoid Legal Battles, Safeguard Your Family's Future

*Avoid probate, disputes, and high taxes. Learn how to safeguard your legacy at our free luncheon*

SAN RAMON, CA, UNITED STATES, March 6, 2025 /EINPresswire.com/ -- "Estate planning is often overlooked, yet it is one of the most critical financial decisions you can make for yourself and your loved ones," says [Marilyn Suey](#), CERTIFIED FINANCIAL PLANNER, Certified Exit Planning Advisor at [The Diamond Group Wealth Advisors](#). To better understand its impact, she will offer tips at a free luncheon hosted by The Diamond Group Wealth Advisors, on Thursday, March 13, from 11:00 AM – 1:00 PM at 6101 Bollinger Canyon Rd., San Ramon, CA 94583. Lunch and Learn attendees will learn tips, hear real life stories and get their questions answered by two professionals - a

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*Marilyn Suey*

loss, and avoidable stress.”

Safeguarding Your Assets and Loved Ones while Avoiding Probate Delays and Costs

**Safeguarding Your Legacy and Your Wealth**  
FREE SEMINAR ON ADVANCED ESTATE PLANNING

**Key Topics:**

- Core Estate Planning Docs
- Common Transfer Tax Mitigation Strategies
- Federal Estate and Gift Tax 101
- Property Tax Reassessment Exemption Rules
- Essential Lifetime Gifting Concepts
- Basic Planning for Blended Families

**GUEST SPEAKER:** **Robert Silverman**, Attorney at Law, Silverman & Jaffe

**HOSTED BY:** **Marilyn Suey**, CERTIFIED FINANCIAL PLANNER®, Certified Exit Planning Advisor®, Accredited Investment Fiduciary®, Certified Plan Fiduciary Advisor®

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Conversations that make a difference

**Thursday, March 13, 2025**  
**11:00 AM - 1:00 PM**  
3rd Floor Conference Room,  
6101 Bollinger Canyon Rd.,  
San Ramon, CA 94583

Free Estate Planning Seminar  
Register today!  
Scan the QR code  
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**Lunch and Learn**

wealth planner and an estate planning attorney. To register for Lunch and Learn on Advanced Estate Planning, click on [this link](#) or call 925-219-0080.

## Why Estate Planning Matters

"Many people assume estate planning is only for the wealthy, but everyone benefits from having a plan in place," she says. "Without an estate plan in place, your family may face unnecessary legal complications, financial

A well-structured estate plan ensures that assets—whether a home, investments, or savings—are distributed according to one's wishes. Without it, state laws take over.

"Probate can be a long and expensive process, often draining estates of thousands of dollars in legal fees and delaying asset distribution for months or even years," explains Robert Silverman, Attorney at Law, Silverman & Jaffe P.C. "Many families don't realize how much of their inheritance can be lost to taxes. By setting up wills, trusts, and gifting strategies, individuals can preserve their wealth within their family and the causes they care about deeply. Estate planning isn't just about death—it's about protecting oneself in life."

Silverman added, "A durable power of attorney and a healthcare directive allow a trusted person to make critical financial and medical decisions if you become incapacitated."

## Preventing Family Disputes

Family conflicts over estates are, unfortunately, common.

"A well-documented estate plan removes ambiguity and prevents avoidable challenges among heirs," said Ms. Suey, who serves, supports and develops financial plans for high-net-worth individuals, independent women and business owners in San Francisco, East Bay, Danville, Alamo, and nearby cities. "I've seen too many families torn apart because they didn't take the time to plan. Knowledge is power, but action is what truly makes a difference. If you don't make decisions about your estate now, someone else will—and it might not be what you would have wanted."

## Risks of Not Having an Estate Plan

- State Laws Determine Your Estate's Fate – Without a will or trust, state laws dictate asset distribution, which may not align with your wishes.
- Family Conflicts – The lack of a clear plan can cause disputes, potentially leading to costly legal battles.
- Loss of Control Over Healthcare and Finances – Without a durable power of attorney or



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 **Marilyn Suey** CEO & Founder, The Diamond Group  
CERTIFIED FINANCIAL PLANNER®, CEPA®, CPFA®, AIF®  
Marilyn is a nationally recognized Financial Educator, Author, Speaker and Wealth Manager.

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healthcare directive, the court may appoint a guardian to make decisions on your behalf.

- Higher Tax Liabilities – Estates without proper planning often face avoidable taxes, reducing the inheritance left to loved ones.

### Preserve Your Future with Professional Guidance – Join Free Luncheon on Estate Planning

Understanding estate planning can be overwhelming, but you don't have to navigate it alone. We invite you to a free luncheon hosted by The Diamond Group Wealth Advisors, on Thursday, March 13, from 11:00 AM – 1:00 PM at 6101 Bollinger Canyon Rd., San Ramon CA 94583. Robert Silverman, Attorney at Law, will break down the essentials on estate planning, wills and trusts. Learn how to safeguard your assets, avoid probate, and preserve your family's future— all while enjoying a delicious meal.

#### Reserve Your Spot Today

Space is limited, so don't miss this opportunity to gain critical estate planning knowledge. Contact us at 925-219-0080 to register.

“Take control of your wealth, worth and wellbeing —because planning ahead shows how much you care for your family, and the causes you care about deeply.” Ms. Suey said.

Marilyn Suey

The Diamond Group Wealth Advisors

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