



THE  
**ARULDASON**  
GROUP

Realty · Legal · Financial



## Beneficiary Alignment Tips

Ensuring your estate plan reflects your intentions.

## BENEFICIARY TIPS

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One of the most common sources of disputes in estate administration arises when beneficiary instructions are unclear. Ensuring beneficiary alignment means carefully considering what should happen to assets under different scenarios.

### Key Considerations Include:

- What happens if a beneficiary passes away before you
- Whether assets should pass to spouses or children
- Whether funds should be held until beneficiaries reach a certain age

Clear instructions reduce the likelihood of misunderstandings or disputes.

## Why The Aruldason Group

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Our estate planning approach focuses on clarity and foresight.

By carefully structuring beneficiary instructions, we help families avoid unnecessary conflict and ensure intentions are respected.