

Quest Commonwealth Launches 90 Workshops on Estate Planning to Address Common Missteps

Comprehensive sessions in 2024 to educate on estate setup, probate processes, and trust funding, addressing widespread gaps in knowledge.

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[Quest Commonwealth](#), a holistic retirement planning and investment

firm, announced today its ambitious initiative for 2024: conducting 90 in-person workshops focused on Estate Planning. This initiative stems from a recognition of the critical need for proper estate planning, as evidenced by concerning statistics regarding estate management.



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Our mission combats financial illiteracy, beginning with estate planning to meet our community's most pressing needs.”

*Rick Williams, Senior Planner -
Quest Commonwealth*

A recent study revealed that a staggering 60% of Americans do not have an estate plan, leaving them intestate and their assets subject to state laws. Additionally, there is a widespread misconception about wills and probate; research indicates that a majority of individuals are unaware that having a will does not bypass the probate process. Furthermore, a significant number of people who have established trusts fail to fund them correctly, rendering these instruments less effective.

Quest Commonwealth's [Safe Money Mindset](#) platform has been at the forefront of financial education in the community. Recognizing the gap in understanding and implementation of estate planning, the firm has pledged to address this through its series of workshops. These sessions are designed to educate attendees on the importance of having a proper estate plan, the intricacies of probate, and the nuances of funding trusts correctly.

The workshops will cover a range of topics, including how to set up an estate plan that reflects personal wishes and legal requirements, the probate process and how to navigate it, and the crucial steps to ensure trusts are funded and managed correctly. These sessions are aimed at

empowering individuals with the knowledge and tools to make informed decisions about their estate planning.

Quest Commonwealth's initiative is a response to a growing need for [financial literacy](#), particularly regarding estate planning. By hosting these workshops, the firm hopes to foster a community that is well-informed and prepared for the complexities of financial management in later life.

About Quest Commonwealth:

Quest Commonwealth is a full-service retirement planning and investment company dedicated to holistic financial solutions. The firm offers a range of services, including investment management, retirement income planning, tax planning, Medicare, and estate planning, all underpinned by its commitment to financial education through the Safe Money Mindset platform.

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