

Basic Estate Planning

Estate planning is critical, yet less than half of Americans have any form of estate plan.

Without proper documents, your loved ones may face a lengthy and costly court process to manage your affairs or distribute your assets upon your death or incapacity.

Regular review and updating of your estate plan is essential as your life circumstances change.¹ By taking proactive steps with estate planning, you can provide financial stability and peace of mind for your loved ones.

**Contact your
financial agent today!**

Agent

Name:

Agent

Contact:

What documents make up a comprehensive estate plan?

- Revocable Living Trust
- Last Will & Testament
- Financial Durable Power of Attorney
- Healthcare Power of Attorney
- Transfer Deed(s) for Real Property to be protected from probate.

These allow you to designate trusted individuals to make decisions on your behalf and distribute your assets according to your wishes.

Our team of Legal Professionals can give your family peace of mind by planning for the inevitable.

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