



Estate Planning

6 STEPS TOWARD A SUCCESSFUL STRATEGY

1

SEEK PROFESSIONAL ASSISTANCE

Work with a trusted estate planning attorney and consider consulting with accountants and financial planners to ensure a comprehensive approach to your estate plan.

2

CREATE YOUR WILL

Choose a personal representative to handle your estate and clearly outline how you want your assets distributed. Make sure to include a plan for a guardian if you have minors, and consider setting up a trust for their added protection.

3

EXECUTE A DURABLE POWER OF ATTORNEY (DPOA)

Let a trusted person handle important decisions about your business, legal, and financial matters. This helps avoid the need for court involvement or oversight in managing your affairs.

4

EXECUTE ADVANCED DIRECTIVES

Everyone should consider having a Living Will and Health Care DPOA. These documents allow you to choose someone to follow your wishes for life-sustaining treatment if you become terminally ill or unable to communicate. Appoint someone to make important health care decisions for you if you're unable to make them yourself.

5

CONSIDER A LIVING TRUST

A Trust can be set up during your lifetime or upon your death and can be changed or revoked at any time while you're alive. A living trust offers a smooth way to manage your assets, helping you avoid probate, reduce legal fees, and protect your beneficiaries' privacy.

6

INDIVIDUALIZE YOUR PLAN

Each estate plan is unique and should reflect your family, assets, and personal goals. Take the time to create a tailored plan that fits your specific needs.



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